T O U R I S M

British Columbia
Recreational Vehicle Campground/Resort Study
Phase I
Main Report

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

92-01395/

ACKNOWLEDGEMENTS

This study was funded through the Canada-British Columbia Tourist Industry Development Subsidiary Agreement. The Agreement, which provides a variety of programs for tourism development, is cost-shared equally by the governments of Canada and British Columbia. All of the activities undertaken through this Agreement are approved by a Federal/Provincial Management Committee established for the administration of the Agreement.

The Canada-British Columbia Tourist Industry Development Subsidiary Agreement is one in a series of subsidiary agreements under the Economic and Regional Development Agreements (ERDA) signed in November 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Industry, Science and Technology Canada

Industrie, Sciences et Technologie Canada

British Columbia Ministry of Regional and Economic Development

British Columbia Ministry of Tourism

BRITISH COLUMBIA

RECREATIONAL VEHICLE CAMPGROUND/RESORT STUDY

PHASE I

MAIN REPORT

prepared for:

BRITISH COLUMBIA MINISTRY OF TOURISM

funded by:

CANADA - BRITISH COLUMBIA SUBSIDIARY AGREEMENT ON TOURIST INDUSTRY DEVELOPMENT

prepared by:

THE ECONOMIC PLANNING GROUP of Canada

in association with:

MARKTREND MARKETING RESEARCH

NOVEMBER, 1989

Canadian Cataloguing in Publication Data

Main entry under title:
British Columbia recreational vehicle campground/resort study, phase I

"Funded by Canada-British Columbia Tourist Industry Development Subsidiary Agreement."
On cover: Economic & Regional Development Agreement, Canada, BC.
Includes bibliographical references.
ISBN 0-7726-1060-6

1. Camp sites, facilities, etc. - British Columbia. 2. Tourist trade - British Columbia. 3. Recreational vehicles - British Columbia. I. Economic Planning Group. II. Marktrend Marketing Research Inc. III. British Columbia. Ministry of Regional and Economic Development. IV. British Columbia. Ministry of Tourism. V. Canada. Industry, Science and Technology Canada. VI. Canada-British Columbia Tourist Industry Development Subsidiary Agreement. VII. Canada/BC Economic & Regional Development Agreement.

GV198.67.C3B74 1990 381'.4579679'09711 C90-092034-3

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Province of British Columbia
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2 MAINLAND SOUTHWEST
3 THOMPSON - OKANAGAN
4 KOOTENAY
5 CARIBOO
6 NORTH COAST
7 NECHAKO
8 NORTHEAST
1988
AMENDED
PACIFIC
OCEAN
CROSS SOUND
DIXON ENTRANCE
PRINCE RUPERT
QUEEN
CHARLOTTE
SOUND
HECATE
STRAIT
GEORGIA
STRAIT
PRINCE GEORGE
KAMLOOPS
KELOWNA
VICTORIA
NANAIMO
VANCOUVER
BELLINGHAM
ISDR

1.0 INTRODUCTION

1.1 BACKGROUND

During the past two decades the popularity of RV camping in North America has increased dramatically. With the exception of the early 1980's recession, growth has been steady and there is every indication that considerable growth potential remains. As the number of people using recreational vehicles continues to expand so has the demand for services and recreational and entertainment amenities. This demand has created a variety of different styles of RV parks catering to a variety of different users.

In the early post-war period, campgrounds were used as facilities to set up tents or small trailers when travellers were visiting lakes or parks. As more people began using RV's, campgrounds began providing a wider range of facilities. These included electricity, water, sani-stations and sewer connections.

In recent years, RV camp resorts have represented one of the fastest growing segment of the U.S. resort development industry. Many have evolved into very sophisticated "outdoor resorts" providing a variety of amenities including pools, spas, saunas, game rooms, stores, clubrooms, planned recreation activities and even telephone and cable T.V. connections.

These North American developments are influencing the RV campground industry in B.C.. Recreational vehicle designs are constantly improving and RV users are becoming increasingly sophisticated and demanding. It appears likely that as the number of people owning/operating RV's increases so will opportunities for developing and marketing RV campgrounds and resorts.

Available statistics substantiate the likelihood that the RV industry will continue to grow. U.S. and Canadian research shows that travellers are continuing to take shorter and more frequent vacations. This in itself is good news for the RV industry since RV's are ideal for short, easy to plan trips (i.e. convenience, flexibility and comfort).

However, there appears to be negative trends effecting the RV industry including threats of future recessions, fuel price increases, a declining trend in camping, a decline in the number of campgrounds and the increasing costs of RVing.

In an attempt to resolve these positive and negative issues the Ministry of Regional Development sponsored this report in conjunction with the Ministry of Tourism and Provincial Secretary, and Industry Science and Technology Canada.

It is intended to document the status of the province's recreational vehicle industry and to forecast the outlook for the 1990's.

1.2 OBJECTIVES

The overall intent of the project is to **assess the current status of the B.C. campground industry, review market and development opportunities, and produce appropriate marketing and development strategies**.

The project is separated into two phases. Phase I is directed toward the facility inventory, market profiles, vehicle production trends, comparisons to RV campgrounds elsewhere and economic impact. Phase II involves the preparation of marketing and development strategies, and the development of a model for campground development into the 1990's. (This report is Phase I.)

The specific objectives as outlined in the terms of reference are as follows:

PHASE I

1. To provide information on the existing British Columbia campground industry with reference to:
   - facility and service inventory;
   - operational data;
   - fees and charges;
   - revenues and expenses;
   - profitability; and
   - industry performance.

2. Identify current trends in production and ownership of recreational vehicles.

3. An evaluation of current market profiles and an assessment of market potential.

4. An assessment of the calibre of B.C. RV campgrounds and resorts and identification of development priorities.

5. A competitive analysis of RV campgrounds and resorts in Western Canada and Pacific Northwest.

6. Development and marketing profile of six of the most successful RV campgrounds and resorts in Canada and the U.S.

7. The economic impact of RV use in B.C. including a spending profile of the self-contained RV or motorhome.

PHASE II

8. Based on findings of Phase I, recommend a development and marketing strategy for B.C. campground and resort owners.

9. Prepare a model for RV campground and resort development for the 1990's.

1.3 SCOPE

This study assesses the status and development potential of the B.C. RV campground industry with the intent of providing the private sector with the information necessary to encourage successful product development and marketing approaches. It is intended to focus on the commerical or private sector campgrounds as far as future development opportunities are concerned while including public sector facilities in the inventory and users surveys.

The RV Campground and Resort Industry refers to those commercial campgrounds or resorts which provide campsite space to the users or owners of recreational vehicles on a non-permanent or transient basis. Recreational vehicles refer to a variety of camping vehicles including converted vans, camper vans, truck campers, pop-up trailers, travel trailers, fifth-wheel trailers, mini-motorhomes and motor homes. By intentional omission, this study does not deal with mobile home parks or any of the more permanent/residential oriented parks.

Geographically, the analysis covers all of the province and the recommendations are expected to be appropriate throughout B.C., with regional variations as required.

1.4 METHODOLOGY

The completion of this project involved an extensive amount of both secondary source research and original survey work. The following activities were undertaken:

- A survey of RV owners who camped in British Columbia's commercial and provincial campsites to produce a profile of current users.

- A survey of B.C.'s RV campgrounds to determine facilities, operating statistics and markets.

- A focus group of B.C. RV owners to discuss trends, future outlook, likes/dislikes, attitudes, suggestions and development opportunities.

- A survey of B.C.'s RV manufacturers to determine volumes, trends, outlook and economic impact.

- One on one interviews with selected RV campground operators and industry representatives in Canada and the U.S. to discuss and resolve a range of RV related issues.

- Field research in British Columbia, Washington and Oregon to compare industry growth and trends.

- Collection and review of secondary source information. (A complete listing of this information is contained in the bibliography in the Appendix.) It includes a range of material obtained through library scans, from RV trade magazines and from studies completed by various industry organizations.

- An RV facilities inventory, providing a complete listing of RV campgrounds available in B.C.. The inventory includes every commercial campground in the Province which provides at least two serviced sites. The inventory has been organized to reflect the Province's eight economic zones with campgrounds listed alphabetically by zone, and includes data regarding the number of sites and available facilities.

2.1 THE RV INDUSTRY SYSTEM

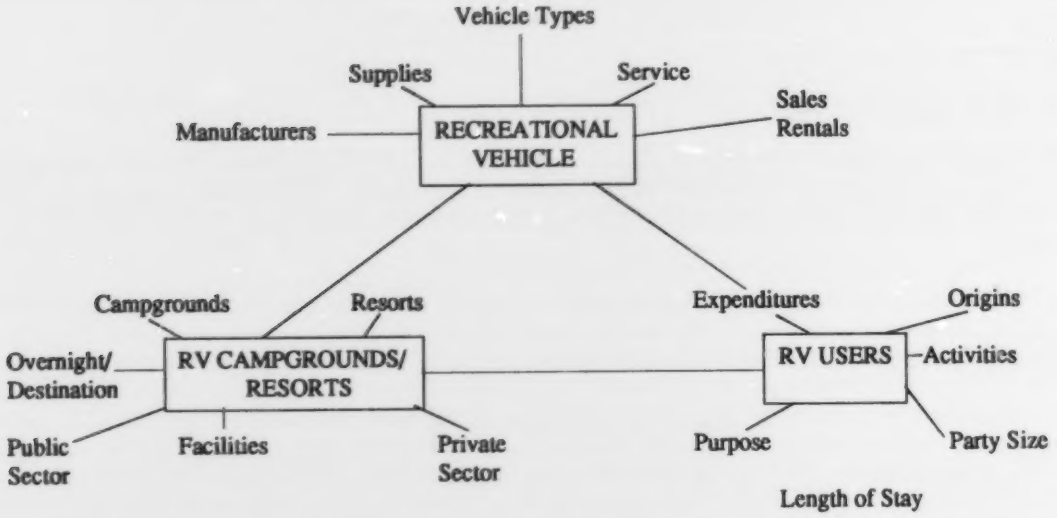
The RV industry is comprised of various components. The key elements of the system are:

- the recreational vehicles themselves (RV's)
- where they are used (RV Campgrounds)
- the people who use them (RV Users).

Each element of the system is comprised of various sub-sectors as depicted by the following schematic chart.

EXHIBIT 2-1

RV INDUSTRY SYSTEM



The recreational vehicles themselves come in a variety of shapes and sizes but basically fall into two categories - towables or driveables. Within each category there are a number of different types of vehicles. (See Section 2.2 for a list and description of each type.)

The recreational vehicle element of the RV system is further comprised of the individual manufacturers that make the vehicles, the dealers that sell and maintain them and the RV rental agencies. Within this category are another group of businesses that manufacture and supply a wide array of aftermarket supplies such as awnings, hitches, heaters etc.

The second element of the system are the RV users - the people that own or rent RV's. These people cover all age groups, all income brackets, and all occupations. Those that use their RV in British Columbia come from all over North America and abroad; travel as singles, couples, families and other party compositions; travel for as short as a weekend trip or on extended trips of many months; pursue a variety of tourist related activities; and spend varying amounts of money on their trips.

The third element are the RV campgrounds and RV resorts. These are the places where RVers park their vehicles. They can be very basic and rustic campground style facilities or very elaborate facilities offering all the amenities of a resort. They can be owned by federal, provincial or municipal levels of government, or by the private sector run as revenue generating businesses. They can also be overnight facilities catering to touring RVers or extended stay resort type facilities.

The overall RV industry system is dependent on all three individual elements for its success. Consequently, this

report looks in detail at all three elements. It is noted, that the main focus of this analysis is on the Recreational Vehicle Camp-ground/Resort. However, what is happening with the vehicles themselves is instrumental to the future of the RV campgrounds and resorts which cater to these vehicles. The following sections outline various aspects of recreational vehicles.

2.2 RECREATIONAL VEHICLE TYPES

These are several types of recreational vehicles, each of which is either towed or driven. They all have in common the feature of providing sleeping accommodation and may contain cooking and eating facilities plus bathrooms, showers and enter-tainment areas.

The quality, size and range of features available covers the spectrum from very basic to very elaborate. At one end of the scale are tent trailers or camper vans which may contain little other than a mattress for sleeping. At the other end are fifth wheel trailers or Class A motorhomes. These vehicles contain separate bedrooms, fully equipped kitchens, four piece bathrooms and living room style furniture making them truly a home away from home.

2.2.1 DRIVEABLE RV's

As noted, RVs can be classed as either 'driveable' or 'towable'. Driveable RVs have their own engines and as a result are completely self contained. Unlike towables, passengers can sit anywhere in a driveable RV as long as they have a seat belt. These RVs can tow additional equipment including boats, motorcycles and cars etc. Driveable RVs can be categorized and defined as follows:

- **CLASS A MOTORHOMES**

Class A motorhomes are considered the most luxurious of all motorhomes. They range in length from 20 - 40 feet and can be gas or diesel powered, with engines in either the front or back. Class As weigh between 9,000 and 25,000 lbs. Prices start about $50,000 and can exceed $200,000. Custom models are even more costly, typically ranging between $200,000 and $400,000.

The driving compartment of a Class A is an integral part of the living area, thus, the coach section can be entered from the driver's area without getting out of the vehicle. Large batteries, an extensive supply of propane, 200 gallon holding tanks and on board generators, enable owners to operate all systems without having to rely on campsite hookups.

Many vehicles include a host of modern conveniences ranging from microwaves to built in freezers and vacuums, cellular phones, back up cameras and entertainment centres. New Class As tend to reflect quality workmanship and materials, maximum comfort and lots of room for storing a full complement of recreational equipment.

- **CLASS B MOTORHOMES**

Class B motorhomes, or van conversions, comprise a large portion of the RV market. Their popularity is a result of their versatile use as both a camper van and a family vehicle. Class Bs come in a range of sizes although the average is 17 - 19 feet. They weigh between 5,000 and 7,000 lbs. and cost an average of $25,000 - $45,000.

Class Bs offer a range of interior configurations which attempt to incorporate compact versions of the larger RVs. Starting with a van chassis and stripped interior, manufacturers add a raised roof for passenger headroom. Interiors are then developed and outfitted with any two of sleeping, kitchen and/or toilet facilities plus electrical and water hookups. The simplest of this category are known simply as van conversions.

Appointments can be luxurious and include plush carpeting, quality furniture and built in entertainment centres. The Class B fits in regular parking spots, is easy to drive and gets the best mileage of all RVs. In addition, Class Bs can be outfitted to tow travel trailers.

- **CLASS C MOTORHOMES**

The Class C is a combination RV constructed by building a travel trailer body onto the chassis of a truck. Class C engines are located at the front of the vehicle and are powered by gas or diesel. They range from 19 - 28 feet and offer a variety of interior configurations. They weigh between 6,000 and 10,000 lbs. and typically cost between $35,000 and $70,000. Class Cs are generally smaller than Class As but offer full sleeping, kitchen, living room and bathroom facilities, - all accessible

from the driver's section and can accommodate up to 6 people. In addition, entry to the driving area is also possible through the cab doors.

The most distinguishing feature of the Class C is the front section that hangs over the cab which provides sleeping space. Additional sleeping space is usually available by folding down the dinette table and/or the sofa, or in a separate rear bedroom. Kitchen and living areas are comfortable and offer various levels of luxury depending on individual tastes and budget.

- **TRUCK CAMPERS**

Truck campers were one of the first forms of RVs. They are increasing in popularity after several years of decline and are probably the most versatile form of RV, available to anyone with a pick-up truck. In addition the price for a camper is reasonable and ranges between $4,000 and $10,000.

Truck campers involve a separate detachable unit which mounts on the back of a pick-up truck and can be removed so the truck can be used for other purposes. This feature has made them popular among sportsmen and young families.

Truck campers typically sleep two adults and one or two children. Depending on the model it can offer the basics in eating, sleeping (usually in the cabover) and storage, or can provide spacious units that contain full baths, dining areas and complete galleries. Interiors tend to be more basic but can be finished and include special attractions such as skylights. A truck camper can tow a trailer or boat etc. and, when not in use, can be stored on its 'legs'.

2.2.2 TOWABLE RVs

Towable RVs are towed by a car or truck. They come in a range of styles and are less expensive than other RV options - largely because they are trailers. The main advantage of towables is that they can be unhooked at the traveller's destination allowing the tow vehicle to be used for local transportation or sightseeing. Towable RVs include:

- **TRAVEL TRAILERS**

Travel trailers range in size from 13 feet to more than 30 feet. As a result weight varies greatly and costs range from around $7,000 to $30,000. The smaller trailers can be towed by most cars while the larger ones require the power of a larger car or truck.

Interior features of a travel trailer depend largely on the size and cost of the vehicle. Thus the smaller trailers may provide only limited fold-down sleeping accommodation, a small burner, sink and fridge and a port-a-potty while the larger ones can offer all the amenities of home such as toilets, showers, full electrics, larger sized stoves and refridgerators and even microwaves, entertainment centres, plush furniture and other luxury items.

Floor plans can be selected according to taste and needs. Increasingly travel trailers are being insulated and winterized so that they can be used on a year round basis.

- **FIFTH WHEEL TRAILERS**

Fifth wheels have been steadily increasing in popularity since they were first introduced over 20 years ago. They are called fifth wheels because their front portion fits into a special wheel-shaped hitch mounted in the bed of a pick-up truck. This hook-up system makes the fifth wheel the easiest handling vehicle in the towable RV category.

Fifth wheels are available in sizes ranging from 17 to 40 feet and cost between $12,000 to $50,000. Much of their popularity is due to the fact that the master bed area is built into the overhead above the hitch. This area, which is up to eight feet wide, provides an efficient use of space.

Both the smaller and larger fifth wheels offer full bath facilities and complete galleries. As with other RVs, the larger the unit the more luxurious it tends to be. Some of the big units, for example, offer etched glass cabinets and hand crafted bars and desks in addition to microwaves, washers, dryers and vacuum systems. The living area of a fifth wheel can be expanded with the use of electronic slide-out rooms. Combining this option with fully winterized construction, makes it possible to use, or even live in, a fifth wheel on a year round basis.

- **TENT OR FOLD DOWN TRAILERS**

Tent trailers are usually canvas sided and often have a waterproof fibreglass roof. These RVs are designed to fold down during transportation and be erected when in use. Because they are relatively light they can be towed by almost any sized vehicle.

Tent trailers range from very simple units providing basic sleeping and storage facilities, to fully equipped models providing a stove, fridge, furnace, water system and toilet. Tent trailers range in size from 7 to 16 feet and, once unfolded, can provide sleeping area for 6 - 8 people in the two bedroom areas at either end of the unit and in the dinette area in the middle which converts to bed space.

Because they are canvas sided, tent trailers are mainly designed for warm weather camping. They weigh between 400 and 1600 lbs. and prices range from $3,000 to $8,000.

- **PARK MODELS**

In many ways park model trailers are similar to mobile homes. The popularity of this trailer is based on their growing use as a semi-permanent or summer dwelling. Generally speaking, parks models are too large to be regularly towed. As a result they are generally delivered by the dealer directly to the site where they will stay on a more or less permanent basis.

Park models are typically 28 to 35 feet in length, provide an average of 250 - 400 square feet of interior living space and cost between $15,000 and $40,000. These trailers may include sections which can be folded out to increase normal 8 feet widths to 10 or 12 feet.

Park models include full bedroom, kitchen, bathroom and living facilities and their furnishings and appliances are similar to those found in homes and apartments such as full beds, large closets, well upholstered furniture, entertainment centres, large kitchens etc. Many park models are set up like a summer cottage and thus may have patios and panoramic windows.

2.3 RV MANUFACTURING TRENDS

The decision to incorporate specific amenities or design features into an RV campground results, to a large extent, from consideration of trends occurring in vehicle manufacturing. The objective of this section is to provide a summary of manufacturing trends so that campground operators are aware of what is taking place and have a basis from which to make development decisions.

There are currently more than eight million RVs on the road in the United States and more than 750,000 in Canada. By the end of 1988 it was estimated that one in 10 households owned an RV. The number of households owning an RV is expected to increase by approximately 100,000 annually.

The Recreational Vehicle Dealers Association (American) predicts a 15% unit sales growth for the decade 1990 - 2000. This would equal 2.76 million units (compared to 2.4 million sold between 1980 - 1990). Were this trend to continue this figure would increase to three million between 2000 - 2010 and 3.15 million between 2010 - 2020. This means that the total number of RVs on the road would increase from eight million currently to over 15 million in 2020.

In Canada, the latest issue of RV Buyers Guide (1989) listed a total of nearly 200 new vehicle types with over 800 models and sizes. (This list is exclusive of custom orders.)

Type	Brands/Types	Models
Class A	28	126
Class B	15	51
Class C	39	148
Travel Trailers	43	199
Truck Campers	8	28
Fifth Wheels	38	167
Park Models	17	78
Folding Trailers	9	45
	197	842

Although the number of RVs on the road is expected to continue to grow, the kinds of RVs will change as a result of evolving lifestyles, new innovations and changing preferences. Understanding these changes is important, especially in terms of identifying the kind of campground design and the nature of facilities and services needed to attract future RV users. U.S. trends indicate:

- The market share for travel trailers (including conventional, park and fifth wheel) has dropped annually for the last 13 years falling from 35% in 1976 to today's rate of 22.5%.
- Truck campers have been gradually increasing their share of the market after reaching a low of 2.1% in 1976. However they currently only hold 2.6% of the market.
- The market for folding tent trailers has remained relatively stable at 9 - 10% for the last decade.
- The market share for motor homes has been undergoing a slow decline and currently stands at 17%.
- The largest market share for all RVs is held by van conversions. The number of van conversions in the market has increased steadily over the past decade and now stands at almost 48%. These vehicles typically are multi-use vehicles, being used as a family car during the week and for camping on the weekend.

The above market share information is more clearly outlined in the following chart.

EXHIBIT 2-2

U.S. PRODUCTION MARKET SHARE BY TYPE OF UNIT
(To August each year)

	1989	1988
TOTAL RVs	100.0%	100.0%
Travel Trailers:		
Conventional	13.5	14.0
Park Models	2.0	1.8
Fifth Wheels	7.4	7.5
Folding Camping Trailers	8.3	10.1
Truck Campers	2.6	2.6
TOTAL TOWABLES	33.7%	36.2%
Motorhomes:		
Class A	9.3	9.8
Class B	1.3	1.2
Class C:		
Minis	4.6	5.0
Low Profiles	0.5	0.5
Micro-minis	0.6	0.6
TOTAL MOTORHOMES	16.3	17.2
Multiuse Van Conversions	50.0%	46.7%

The above trends are confirmed by Canadian shipping and production statistics. Available information indicates that the number of RVs being produced in Canada is also increasing annually. For example - in 1988 19,600 RVs were shipped from manufacturers to dealers. This figure represents a 12% increase over 1987 which, in turn, experienced a 20% increase over 1986. As with the above figures, 1989 shipment levels have decreased somewhat unexpectedly. This decline is most apparent among Class Cs, Class As and travel trailers. Only fifth wheels have increased marginally.

Results from a 1988 National RV Industry Survey conducted by the RVDA indicate that RV sales in Canada increased annually between 1986 and 1988. The percentage of new and used RVs which make up these totals also varied with an increasing number of people opting to purchase a new vehicle. During this same period, RV sales in B.C. rose and then decreased sharply.

The following chart tabulates the above information and indicates some of the changes which have taken place in the type of RV being sold during the last three years. The information in this table is based on sales of new and used vehicles.

EXHIBIT 2-3

CANADIAN RECREATIONAL VEHICLE SALES

	1986	1987	1988
Percentage New	42%	45%	56%
Percentage Used	58%	55%	44%
B.C. RV Sales (% of Total)	32%	36%	22%
Vehicle Sales:			
- Class A	5.4%	5.4%	4.8%
- Class C	14.7	15.6	11.8
- Vans	3.8	4.2	3.0
- Trailers	38.3	35.3	43.2
- Fifth Wheels	9.0	10.5	8.3
- Truck Campers	8.7	10.7	8.7
- Tent Trailers	8.6	7.7	8.2

While the exact reason for the declines discussed above is not known, it is believed to be the result of a combination of factors including the increase in the manufacturer's sales tax from 12% to 13.5%, concerns over the economy, and the decision by potential purchasers to hold on to disposable income or else invest their money elsewhere.

Nevertheless, although the number of Canadian shipments to dealers is down this year, the total number of shipments (including U.S. products) and the total number of sales are up. This is because imports from the U.S. have increased from less than 10% to almost 25% of the market - or from 4,000 to almost 7,000 units. The general outlook of manufacturers is very positive and it is expected that future manufacturing levels and shipments will remain strong.

2.4 OUTLOOK FOR RV DESIGN

In many respects the RV industry has undergone an innovations revolution in the last few years. Each new model seems to have improved or added more features, appliances, appointments and gadgets. These developments will likely continue as manufacturing companies strive to maintain a competitive edge and respond to demands from consumers.

This latter factor is critical. It is becoming increasingly apparent that RV purchasers want luxury, convenience and the comforts of home. Manufacturers of all sizes of RVs are responding to this demand by continually altering and improving their designs.

Although van conversions are likely to continue to comprise a major share of the RV market due to their popularity as a multipurpose family vehicle, they do not make up a significant portion of RVs using RV campgrounds. Instead campground/park operators can expect to see ongoing increases in the number of large and very large RVs on the road. Although these big units make up a smaller share of the RV market than van conversions, they are used solely and far more extensively for travelling/camping than the vans and, as a result, make up a larger share of the campground market.

Even though a first time RV purchaser may start with a smaller unit, trends indicate most people upgrade after four or five years and are likely to spend double what they paid for their existing unit. At present the most popular motorhomes

are 28 feet to 35 feet in length, however, several RV park operators noted that this year they had a significant increase in rigs between 35 feet and 40 feet.

At present, the majority of RVs being manufactured require 30 amp. power in order to operate their electrical appliances. It is expected that within five years new RVs will be outfitted with 50 amp. hookups in order to meet the electrical requirements of the range of accessories referred to above. The resulting impact on campgrounds providing electrical hookups will be dramatic as 30 amp services will not be adequate.

The desire for increased comfort has lead consumers to demand more living space in their RVs. Manufacturers initially responded to this demand by producing longer rigs and re-arranging standard interior layouts. However, they were somewhat limited in their ability to provide more space both by RVers desire for easy mobility and by length and width road restrictions (40 feet for a single vehicle and 65 feet for a tow vehicle and trailer).

The result has been the development of the 'slide-out'. A slide-out is one or more sections of the RV which can be extended to make living space larger. They are becoming an added feature of both mid and large sized rigs. The resulting impact on campgrounds is that RVers will continue to require sites which are easily accessible but which are also large enough to accommodate the slide-outs.

The growing popularity of slide-outs is coinciding with that of 'park model' RVs. Both of these types of RVs are increasingly being used as substitute cabins for weekend getaways at destination camping areas. At present, sales of park models in Canada are at the highest level they have ever been and manufacturers are expecting an additional 30 - 40% increase during 1989. This development is an important factor for RV campground operators to consider both in terms of traditional clientele and in the type of additional services or amenities such a market would demand.

RVs are all being built with better, lightweight insulation and storm windows. As a result they are becoming increasingly suitable for year round use. This trend will likely continue.

RV manufacturers are also striving to meet the needs of the handicapped by installing access lifts, appropriate driving controls and a manoeuverable interior.

In an attempt to capture the first-time buyer and purchasers interested in used vehicles, many Class A manufacturers are developing smaller, lower priced units. These offer the usable space and drivability features of the larger vehicles but are priced to compete with the bigger Class C vehicles. Initial consumer interest has been strong.

Sales of Recreational Vehicles historically have been very dependent on fuel - both price and availability. Annual production of RV's after 1973 and 1979 oil crisis fell by over 40% respectively. These fuel related problems were compounded by inflation and recession concerns hitting the RV manufacturing industry with a three-pronged attack. In each case, however, production and sales recovered in the years following the declines. The recovery was fairly rapid during the mid 1970's, but considerably more gradual after the 1979 collapse. Since the RV industry closely mirrors the state of the economy, a future healthy economy is good news for the industry while problems with the global or North American economy will again spell trouble.

Luxury appointments in all sizes of RVs have become the norm. Thus, features such as oak cabinets and quality designed furniture are expected rather than selected. Amenities that were options or luxuries are becoming standard equipment. These include microwaves, icemakers, controllable TV antennas, built in video connections, power seats, acoustic ceilings, vacuum systems and entertainment centres. Recent items to the market include portable hot-tubs and exterior mounted cameras to assist with parking and reversing.

Undoubtedly RVs of the future will stock increasingly high-tech accessories. For example, one development currently in the design stages, would allow an RVer to touch a button and have his TV monitor show a map of the area in which he is located, with a flashing light marking his location on the highway. Another button would enable him to illuminate all the public and private campgrounds within 100 miles. Ultimately the video/computer set up would be able to show him the features and layout of the campground he's interested in and allow him to make reservations by connecting with the campground computer.

The point to be noted is that many RVers will be pursuing increasingly sophisticated and luxurious travelling lifestyles. Although they will likely still want an outdoor 'camping' experience, they will want to be able to utilize all their 'toys' in the process.

3.0 B.C. RV CAMPGROUND PROFILE

3.1 RV CAMPGROUND CATEGORIES

RV Campgrounds can be loosely categorized into three general groups. These categories are a reflection of a number of issues including markets, location, area amenities and on-site facilities. Due to the mixture of variables that comprise these categories it is not possible to slot RV campgrounds into one category exclusively.

The main categories of RV campgrounds are:

Overnight RV Campground:

- generally located on or near major highways
- caters mainly to travellers enroute to other destinations or travellers who are touring
- length of stay is typically one night
- range of amenities is usually limited.

Destination Area RV Campground:

- often located near a major city or in a resort area
- may or may not offer on-site recreational amenities
- used by RVers as a base in which to stay while touring or visiting the area
- length of stay varies from 2 - 3 days to a week or more
- may cater to seasonal campsite rentals.

RV Resort:

- often located on or near a scenic resource or feature such as a lake or river
- often oriented to a specific recreational pursuit - has a mix of recreational and visitor service amenities on site
- may or may not be located in a destination area
- length of stay typically a few days to a week or more
- may cater to seasonal RV site rentals.

3.2 EVOLUTION OF RV PARKS IN B.C.

The best records available regarding the evolution of RV Parks in B.C. are contained in the B.C. Accommodation Directory. This publication has provided information to travellers regarding accommodation in the province since the 1920's.

A review of these directories turned up no direct reference to campgrounds until the 1930's. A subsequent review of information contained in the directories provides some insight into the growth of RV parks in our province.

During the 1940's the most popular form of tourist accommodation was the 'autocourt' - typically camping cabins or units which provided basic roofed facilities. In 1940 a small number of the autocourts provided facilities which included an area, space or grounds suitable for parking trailers.

These trailer facilities were largely located at key tourist areas on the lower mainland or Vancouver Island such as Victoria, Vancouver, Courtenay, Qualicum or Campbell River. Services provided were minimal. For $.50 users had access to toilets and occasionally showers or a community kitchen. The main activities promoted at these facilities were fishing, hunting and boating.

By the mid 1950's the number of trailer sites available throughout the province had grown significantly. In addition to making reference to the availability of "space for trailers" the directory included a separate listing for trailer parks. There are approximately 10 references to trailer parks in addition to approximately 15 references to autocourts or motels with trailer space.

The services available at trailer parks were relatively extensive and included central washrooms, hot showers, electric lights and a laundry. Individual descriptions refer to the availability of gas stations, sewer connections, and plug-ins for power. Trailer parks were small and generally appear to have had fewer than a dozen sites. The charge for sites ranged from $1 - $1.50/ day.

By the late 1950's the number of trailer sites had grown noticeably. In addition, the directory had begun to make reference to campgrounds and clearly differentiated between tent sites and trailer sites. The range of accommodation facilities had expanded to include Motel and Trailer Parks; Autocourts, Trailer Parks & Campsites; Tent and Trailer Camps and so forth. Altogether there were over 60 facilities which catered to trailers. About half of these were largely or exclusively trailer courts and there were more references to trailer courts than to campgrounds.

The variety of services available to trailers continued to widen with different trailer courts providing recreation rooms, barbecues, propane, wiring for phone or T.V., 110-volt power and grocery stores. The listings also describe activities nearby such as golf or shopping. Conversely, the emphasis on hunting and, to some extent, fishing had decreased.

The number of sites at each trailer court had also expanded considerably by the late 1950's. Most of the trailer courts had from between 20 and 50 sites and the charge was about $2/day, $7/week or $25/month.

By the mid 1960's trailer courts were a major component of B.C.'s accommodation sector. The number of trailer courts and the average number of individual sites available at each trailer court continued to grow. The range of services remained largely the same with a notable exception being the first references to the availability of on-site camper rentals. This is the first reference both to fixed trailer rentals and to the use of the term 'camper'. The latter seems to reflect recognition of the development of a range of RV styles.

By 1969 the Government had developed a definition for trailer courts for the purpose of clarifying directory classifications. Trailer Parks (actual directory listings alternate the words 'park' and 'court') were described as follows: "Can be partial or complete hookups. Must have designated sites and at least 20% available to tourists in season (May 1 - Sept. 30), provide public bathrooms, showers and preferably laundry facilities. This definition provided some indication that trailer courts were used largely by non-tourist residents. Some of the listings for trailer courts even noted that "Tourists are Welcome".

Although the directory continued to make reference to 'trailer courts' many of these facilities also included tent spaces. At the same time there appeared to be a decrease in the number of motels/autocourts providing 'trailer space'. New services included the provision of dumpstations, reference to 'overnight guests welcome', and playgrounds. The cost for a trailer site had risen to approximately $2.25 - $2.50/day (late 1960's).

By the mid 1970's there were a range of trailer courts/ sites in all regions of the province. Amenities were becoming more sophisticated with indoor pools, complete hookups, cable TV and cafes. A number of trailer courts had campers or tent trailers available for rent as cabins. The majority of campgrounds provided both camping and trailer sites. The number of facilities catering solely to trailers appeared to have declined as a percentage of all accommodation. The size of campgrounds/ trailer courts continued to increase with numerous facilities providing upward of 100 sites.

By the late 1970's 'Campground and Trailer Park' was the most common description of trailer facilities. In addition to an increase in the number of campgrounds/trailer parks providing more extensive recreational amenities such as pools and bike rentals, some facilities began to advertise 'pull-throughs' reflecting an increase in the size of trailers. Many campgrounds/ trailer parks opted to provide either full or partial services. In addition to the $5 average daily fee, trailer users paid additional charges for electricity, power and sewer.

By the mid 1980's the distinction between campgrounds and trailer parks had become blurred. The Government definition for campgrounds included reference to the fact that campgrounds may include full or partial hookups. Previously this applied only to trailer courts. The size of these combined campgrounds/trailer parks were larger than ever - a number had more than 150 - 200 sites. Descriptions of many of these individual campgrounds included reference to the availability of a complete range of recreational opportunities and equipment. Power hookups of 30 amps were available and the existence of firepits had become something regularly advertised.

At present (1989) there are approximately 686 privately owned campgrounds in B.C. which provide at least partial RV hookups, however, the term RV Park has only recently become popular. As a result facilities which provide RV related services are variously referred to as campgrounds, RV Parks, RV Campgrounds or Trailer Parks. The size of these facilities and the range of amenities provided are still expanding.

3.3 B.C. RV CAMPGROUND INVENTORY

There are over 2,000 campgrounds and close to 60,000 campsites in B.C. in 1988. The distribution of these campgrounds is as follows:

Ownership	Campgrounds	Number of Sites
Private	686	39,233
Provincial	150	8,858
Federal	4	1,155
Forestry	1,200	9,990
Municipal	9	381
B.C. Hydro	3	36
	2,052	59,653

The above figures reflect the approximate total number of campsites available in B.C. and not just Recreation Vehicle sites. Only private and some municipal campgrounds offer RV hookup facilities.

This study focuses on the 686 private sector campgrounds in B.C. For the purposes of this report, the definition of a qualified RV campground was a property having a minimum of two serviced or partially serviced RV sites. Consequently those campgrounds offering tenting spaces or unserviced sites only were not included. There are perhaps several dozen of these campgrounds located throughout the province.

Woodall's directory provides a breakdown of the services offered by those campgrounds it lists. These campgrounds represent about 75% of the total number of campsites in the province. The level of services provided by these private campgrounds can be broken down as follows:

Services	No. of Sites	Percentage
Full Hookups	10,494	37%
Water/Electricity	7,114	25%
Electricity Only	718	3%
No Hookups	10,019	35%
	28,345	100%

Comparing these percentages against the total number of private campsite units in the province (39,233) it is estimated that of all the private campground sites 14,500 are fully serviced, 9,800 provide water and electricity, 1,170 provide electricity only and 13,730 are unserviced.

For the purposes of this study we have analyzed the B.C. RV campground industry based on the province's eight economic development zones. Exhibit 3-1 provides a breakdown of the number of private campgrounds and sites available in each of these zones.

EXHIBIT 3-1

CAMPGROUNDS AND CAMPSITES BY REGION

ZONE	CAMPGROUNDS	CAMPSITES	AVERAGE SITES
1	138	8,436	61.1
2	83	7,020	84.6
3	231	13,833	59.9
4	86	5,293	61.5
5	80	2,447	30.6
6	17	522	30.7
7	31	984	31.7
8	20	671	33.6
TOTAL	686	39,233	57.2

Over half of B.C.'s private campgrounds and available sites are located on Vancouver Island or in the Okanagan, although campgrounds in the Lower Mainland region generally appear to be larger than those in other areas. The northern half of B.C. (Zones 6, 7, & 8) have only 10% of the Province's total campgrounds and less than 6% of the total number of individual sites.

Exhibit 3-2 provides a further breakdown of campgrounds by identifying the number which fall into each identified size category in each zone.

EXHIBIT 3-2

NUMBER OF CAMPSITES PER CAMPGROUND

ZONE	1-25	26-50	51-75	76-100	100+	TOTAL
1	38	39	28	11	22	138
2	25	18	11	6	23	83
3	58	75	36	32	30	231
4	24	31	7	14	10	86
5	45	25	5	3	2	80
6	10	4	2	1	0	17
7	16	11	2	2	0	31
8	11	7	1	0	1	20
TOTAL	227	210	92	69	88	685
%	33%	31%	13%	10%	13%	100%

Close to two thirds (64%) of B.C.'s private campgrounds have 50 sites or less while only 13% have more than 100 sites. Although there are campgrounds of varying sizes in almost every region, the north is far less likely to have campgrounds with more than 50 sites than the South, while the Lower Mainland area has the highest percentage of campgrounds with over 100 sites compared to any other region.

The range of services and amenities provided by each of these campgrounds also varies considerably. The following table outlines the percentage of total campgrounds in B.C. which offer the identified service or facility.

It is important to note that the following facilities, policies and services have been derived from a variety of directories and campground listings. In each case all the features of individual campgrounds were tabulated. However, if a campground had a certain facility but did not record it in the listing, it would not be recorded in our tabulations.

EXHIBIT 3-3

PROPORTION OF CAMPGROUNDS WITH SELECTED FEATURES

Operational/Management Policies	
Reservations Accepted	29%
Pets Allowed	29%
Credit Cards Accepted	31%
BCMCRA Member	28%

On Site Campground Facilities	
Electricity	98%
30 Amp Service	25%
Water on Site	79%
Sewer	70%
Cable	10%
Tenting Area	30%
Pull Thrus	29%

Services	
Dump Station	51%
Flush Toilets	75%
Showers	87%
Pay Phone	45%
Propane	12%
Snack Bar	15%
Convenience Store	36%
Laundry	51%

Recreational Amenities	
Recreation Hall	15%
Beach/Swimming	33%
Pool	44%
Hot Tub	6%
Marina	28%
Boat Launch	27%
Motor Boat Rental	23%
Canoe/RB Rental	11%
Fishing	42%
Playground	32%

As the above table makes clear, the facilities/services most likely to be provided in private campgrounds are electrical hookups, showers, water connections, flush toilets and sewer hookups. In addition, close to half of these campgrounds provide a laundry and a sani-station.

The most frequently cited recreational amenity at 44% is a swimming pool. This is followed closely by fishing at 42%. Interestingly, marinas appear to be relatively important as 28% of private campgrounds indicate they have some form of marina facility.

4.0 RV USERS PROFILE

4.1 APPEALS OF RVing

Recreation Vehicles have been around in various forms for decades. These vehicles were initially developed as very basic travel trailers and tent trailers, crude truck campers and delivery van or bus conversions. Many of these vehicles were home-built and contained little in the way of features except a mattress on which to put a sleeping bag.

After World War II the appeal of camping increased dramatically and manufacturing companies sprang up to produce products for this "camping market."

What are the appeals of camping? According to the B.C. Parks Satisfaction Surveys, people camp for a variety of reasons. These reasons have been grouped into five categories which generally reflect the key motivational factors for people to camp (as indicated by surveys of B.C. Park's visitors). They are (in generally declining order of importance):

- To be out in the natural world
- To get away from daily concerns
- To have fun
- To spend time with family and friends
- To be safe and secure

A more extensive survey conducted of over 3,000 B.C. residents (Public Opinions About Camping, 1989) indicated the following responses:

- Being outdoors	43%
- Change of pace/relax	33%
- Outdoor sports	18%
- Peace and quiet	12%
- Good family activity	4%

Furthermore, (at least in British Columbia) the appeal of camping is broadly based as over 4 out of 10 of all B.C. residents indicated taking a camping trip in 1987. According to this survey, 25% used provincial campgrounds, 16% private campgrounds, 13% Ministry of Forests and 7% National Parks.

Within the overall context of camping the RV industry has evolved to the point where 450,000 units are produced annually in North America. What has lead to this dramatic growth in the RV lifestyle? There are numerous appeals of RVing but some of the more common are:

- **Family togetherness**: features a "family room" atmosphere
- **Fellowship**: appeals to persons from diverse backgrounds who share a common interest in RVing
- **Economical holidays**: elminates the costs of hotels/motels and restaurant meals
- **Self-contained**: contains all eating, sleeping and relaxing facilities
- **Flexibility**: can be readied for the days travel in minutes
- **Convenience**: contains the basic facilities for travel...not dependent on hotel or restaurant availability
- **Mobility**: can go anywhere there are roads
- **Comfort**: provides the comforts of home while travelling or camping
- **Luxury**: comforts of RV reduce the problem of leaving the comforts of home
- **Fully equipped**: can take along other recreational equipment such as boats, bikes etc.

When asked what they consider to be the greatest benefit of owning an RV, first-time owners indicated the following reasons.

EXHIBIT 4-1

RV OWNERSHIP BENEFITS

	TOTAL	NEW	USED
CONVENIENCE	**65%**	**67%**	**59%**
Don't have to find/use hotel	12	13	8
Other lodging factors	8	8	11
Mobility/go where you want when you want	26	26	25
Comfort/amenities	25	26	23
Other convenience factors	6	6	7
ECONOMY	**18%**	**17%**	**20%**
Save on lodging	10	10	8
Other economy factors	10	9	12
OTHER	**17%**	**16%**	**21%**
Opportunity to get away/vacation	14	14	14
Going camping	10	10	12
Opportunity for family to get away	6	6	6
All others	9	9	12

4.2 RECREATIONAL VEHICLES OWNERSHIP

Understanding the profiles and motivations of the segment of the population that uses recreational vehicles is important to those who operate RV campgrounds. Furthermore, the characteristics of first-time buyers can provide key insights into how the industry is expected to grow.

The following are selected characteristics of U.S. recreational vehicle buyers. *

- Typical first-time buyers of RV's average 49 years old are married (92%) and are homeowners (92%). These variables are significantly higher than the national average.

- The RV owner generally has a high school education or better and have relatively high household incomes ($40,000+). Again, these characteristics are much higher than the national average.

- Approximately 25% are retired with motorhome owners being the most likely to be retired (35%) and tent trailer the least likely (10%).

- First-time owners come from all walks of life with 15% professional, 14% tradesmen, 13% administration, 11% clerical and 10% sales.

- First-time buyers travel an average of 5,900 miles annually in their RV, while the range is between 9,000 for motorhome owners and 2,800 for tent trailer owners.

- Most (60%) of first-time owners of new vehicles began RVing with a used vehicle.

- Only 11% of first-time buyers rented an RV prior to making their purchase.

- Camping is the overwhelming activity pursued by first-time RV owners although the vehicles are also used for touring (85%), outdoor activities (60%) and guest housing (20%).

- Economy is cited by only 11% as the main reason for purchasing an RV. The main motivating factors are camping (36%), travel (27%), outdoors (14%) and convenience (10%).

- Nearly 8 out of 10 first-time buyers (78%) are "very satisfied" with their RV with a further 17% "somewhat satisfied". 94% indicate that owning an RV has lived up to their expectations.

* Exerpts from a study conducted by the Recreational Vehicle Industry Association (U.S.) by Burton-Marsteller entitled "Understanding First-Time Recreation Vehicle Buyers" (1986).

Another series of surveys provide an indepth profile of the readers of three American RV magazines. In 1987 a sample of subscribers to Trailer Life, Motorhome and Hi-Way Herald were surveyed about their RV's and their lifestyles. These surveys provide information about a large group of serious RV enthusiasts.

EXHIBIT 4-2

RV OWNER PROFILES

PUBLICATION	HI-WAY HERALD	TRAILER LIFE	MOTORHOME
Number of Subscribers	550,000	320,000	120,000
Survey Sample Sizes	984	1,091	1,109
READER DEMOGRAPHICS			
- Median Age	62.5 yrs	61.3 yrs	61.0 yrs
- Married	95%	93%	94%
- Retired	60%	55%	54%
- Average Household Income	$ 36,620	$ 38,500	$ 44,900
- Average Net Worth	$221,400	$203,900	$276,400
RV OWNERSHIP			
- Bought New	56%	59%	59%
- Small Travel Trailer (<25')	15%	26%	2%
- Large Travel Trailer (>28')	17%	23%	4%
- Fifth Wheel Trailer	13%	15%	1%
- Large Motorhome (>25')	28%	20%	72%
- Small Motorhome (<25')	11%	12%	21%
- Mini Motorhome/Van	20%	4%	4%
- Pickup Camper	8%	10%	5%
- Other	6%	7%	5%

RV USEAGE			
- Average days used	42	38	42
- Average number of trips	5.2	4.5	5.5
- Average miles driven	4,900	4,800	5,400
- Nights in Private Campgrounds	16.6	20.7	21.3
- Nights in Public Campgrounds	6.2	10.0	10.5

A survey of Recreational Vehicle users was undertaken to develop a marketing profile and to determine the market characteristics, opinions and preferences of RV visitors using campgrounds in British Columbia. The survey was conducted from May through September in 30 private and public campgrounds throughout the province. In excess of 5,000 questionnaires were distributed in order to receive 1,500 to 2,000 completed questionnaires.

A total of 1,329 questionnaires were completed and returned for analysis. Of these 780 (59%) were surveyed in private campgrounds and 549 (41%) were from public or Provincial Government campgrounds.

4.3 ORIGIN

Forty-eight percent of the RV campers interviewed were residents of British Columbia. Alberta accounted for 23% of the visits followed by the U.S. (19%). The American visitors were predominantly from Washington State and California.

These figures are fairly consistent throughout the economic region of B.C. except for the Kootenay Region where 48% of the users are from Alberta. This is due to the proximity to that province and its popularity with Alberta residents.

The Thompson-Okanagan was the most popular region (34%) while the North East region had the lowest visitation (1%)

EXHIBIT 4-3

ORIGIN AND ECONOMIC REGION

	Vanc Isl.	Mnlnd S/W	Thomp Okgn	Koot-enay	Cari-boo	North Coast	North East	Total
B.C.	60%	72%	44%	36%	56%	25%	35%	48%
Alberta	14	5	26	48	8	26	6	23
Rest of Canada	5	3	6	4	3	8	0	5
Washington	2	5	3	2	4	8	0	3
Oregon	1	0	1	1	3	4	0	1
California	6	6	5	2	8	13	18	6
Other USA	2	2	12	5	8	18	41	9
Offshore	5	6	2	2	10	10	0	5
	100%	100%	100%	100%	100%	100%	100%	100%

EXHIBIT 4-4

REGIONAL DISTRIBUTION

REGION	DESTINATION
Vancouver Island/Coast	13%
Mainland/Southwest	9
Thompson/Okanagan	34
Kootenay	16
Cariboo	18
North Coast	8
North East	1
	100%

Note: The destination figures are influenced by the sample of campgrounds cooperating with data collection.

4.4 TRAVEL PARTY CHARACTERISTICS

The average party size for RV campers in B.C. is 2.9 persons per party. The party size is consistent from most destinations, however Alberta is the highest at 3.2 persons.

The parties are made up of 50.5% females and 49.5% males. The party composition is as follows.

EXHIBIT 4-5

PARTY COMPOSITION

AGE	%
15 and under	17.7
15 - 18	2.8
19 - 24	1.7
25 - 34	11.1
35 - 44	17.8
45 - 54	12.1
55 - 64	17.4
65 and over	19.4
	100.0%

The parties appear to be younger families with children and older couples. Young adults 15 - 24 years are the smallest age group.

4.5 VEHICLE TYPE

EXHIBIT 4-6

RV USE BY ORIGIN
(%)

	B.C.	Alta.	Cda.	Wash	Ore.	Cal.	Other US	Off-shore	Total
Travel Trailer	23	27	22	29	25	19	17	3	23
Mini Motorhome-(C)	16	15	20	12	6	16	19	3	16
Full Size Motorhome-(A)	9	9	9	17	31	30	26	65	15
Truck & Camper	18	16	9	12	13	6	15	5	15
5th Wheel Trailer	11	7	14	12	13	16	11	0	10
Tent Trailer	12	5	6	5	6	8	6	22	9
Van Conversion-(B)	9	19	3	5	6	3	3	0	9
Other	3	2	2	17	7	0	3	3	3

The travel trailer is the most popular RV utilized (22%) followed by mini motorhomes, (16%) full sized motorhomes (15%) and truck and campers (15%).

Generally 90% of the units are user owned. The rest are rented (7%) or borrowed (3%). The offshore market is just the opposite as 90% rent their RV's.

4.6 LENGTH OF TRIP

The length of vacation reported by RV users is very high (25.6 nights per trip) as is the average length of stay in B.C. (12.9 nights per group). This is higher than the general tourist to B.C. which is 5.7 nights. (Visitors '87)

EXHIBIT 4-7

LENGTH OF STAY BY ORIGIN

ORIGIN	NIGHTS AWAY ON TRIP	NIGHTS IN B.C.	NIGHTS PER CAMPGROUND
B.C.	13.4	11.7	4.1
Alberta	16.2	12.7	5.6
Rest of Canada	40.4	15.6	2.4
Washington	29.6	11.0	2.3
Oregon	38.1	11.7	6.1
California	48.3	16.7	3.2
Other USA	74.5	12.6	2.0
Offshore	47.5	20.1	2.8
Total Average Nights	25.6	12.9	4.0

Origin dictates length of trip. The visitors that travel the furthest to get to B.C. are on the road the longest. California travellers spent the longest time in B.C. for North American tourists but Offshore visits were in the province on average longer than most (20.1 nights).

The length of stay by Economic Region also varied. Travellers to the North coast stayed over 22 nights.

EXHIBIT 4-8

LENGTH OF STAY BY REGION

REGION	NIGHTS IN BC	NIGHTS PER CAMPGROUND	NIGHTS AWAY ON TRIP
Vancouver Island	10.9	3.3	15.4
Mainland/Southwest	12.0	3.9	27.3
Thompson/Okanagan	12.9	4.8	25.8
Kootenay	9.5	4.1	16.1
Cariboo	13.9	2.2	29.5
North Coast	22.5	5.9	51.8
North East	11.8	1.3	36.5
B.C.	12.9	4.0	25.6

Each party was asked how many RV trips they expected to take in 1989. Each party expected to go on an average of 5.4 trips this year. The response differed by origin. Washington State residents appeared to be the most active campers predicting 7.9 trips followed by B.C. residents (6.5 trips) and Californians (5.1 trips).

EXHIBIT 4-9

EXPECTED RV TRIPS IN 1989 BY ORIGIN

B.C.	6.5
Alberta	4.7
Other Canada	3.1
Washington	7.9
Oregon	4.3
California	5.1
Other USA	3.7
Over Seas	1.9

Total 5.4

RV users expected to be away from home an average of 42.8 nights in 1989. Alberta residents estimated the lowest number of nights at 31.1 nights while US visitor predicted being away from home 83.1 nights.

4.7 ACTIVITIES

The activities participated in by RV campers were diverse, and most parties participated in several activities on their trip to B.C. "Sightseeing" and "shopping" were the most popular activities followed by "wildlife viewing" and "going to the beach". "Swimming" and "visiting historic places" also rated high.

EXHIBIT 4-10

ACTIVITIES PARTICIPATED IN WHILE IN B.C.

ACTIVITY	TOTAL	GOVERNMENT	COMMERCIAL
Sightseeing	85 %	87 %	83 %
Shopping	72	76	70
Wildlife viewing	62	89	63
Beach	60	44	71
Swimming	53	40	61
Historic Sites	52	54	51
Friends and Relatives	49	48	50
Gardens/Parks	43	48	40
Fishing	40	39	41
Museum/Gallery	36	40	34
Boating	27	27	27
Festivals/Fairs	9	10	7
Sporting Events	8	9	7
Cultural Events	7	8	6
Other visited	5	6	4
Other event	5	6	5
Other activities	13 %	12 %	13 %

Note: Percentages total over 100% due to multiple responses.

4.8 TRIP PURPOSE

The primary trip purpose was to "go camping" (41%) followed by "sightseeing/touring" (34%). "Camping" was the main motivation for Albertans and B.C. residents but visitors from other market areas came to B.C. to sightsee or tour.

EXHIBIT 4-11

PURPOSE OF RV TRIP
(Origin %)

Purpose	B.C.	Alta.	Cda.	Wash.	Ore.	Cal.	Other US	Off-shore	Total
To go Camping	55	54	14	17	13	7	5	13	41
Fishing	4	4	3	10	19	15	9	0	5
Other Outdoor Activities	2	3	0	0	0	0	1	3	2
Visiting Friends and Relatives	12	9	28	5	0	2	3	5	10
Sightseeing/ Touring	19	23	41	56	69	68	79	76	34
Other	8	6	14	12	0	7	4	3	7

4.9 CAMPGROUND SATISFACTION

Satisfaction with the campground facilities varied by type of campground. Generally the Government campgrounds rated higher than commercial/private camping facilities. On a scale of 1-5, (1 being very dissatisfied and 5 being very satisfied), commercial campgrounds were rated 3.6 whereas Provincial campgrounds and National campgrounds in B.C. scored 4.4 and 4.1 respectively. The ratings varied somewhat by location but generally were consistent. Private operations in the Cariboo and the North East (3.8 and 3.9) faired the best on a regional comparison.

EXHIBIT 4-12

CAMPGROUND SATISFACTION BY REGION

	REGION							
CAMPGROUND TYPE	Vanc Isl.	Mnlnd S/W	Thomp Okgn	Koot-enay	Cari-boo	North Coast	North East	Total
Commercial	3.2	3.5	3.7	3.3	3.8	3.7	3.9	3.6
Provincial	4.5	4.5	4.4	4.2	4.3	4.4	4.0	4.4
National	4.2	4.2	4.1	4.0	4.1	4.3	4.2	4.1

4.10 CAMPGROUND SELECTION

Visitors were asked how they heard about the campground in which they were staying. B.C. and Alberta RV users generally had been there before but most RV users found out about the campground by using a directory. The reasons are depicted in detail in the following table.

EXHIBIT 4-13

HOW DID YOU FIND OUT ABOUT THIS CAMPGROUND BY ORIGIN?
(%)

METHOD	B.C.	Alta.	Cda.	Wash.	Ore.	Cal.	Other US	Off-shore	Total
Been here before	63	49	16	29	27	9	5	14	45
Word of Mouth	15	22	16	7	0	14	13	8	16
Directory	11	13	39	49	40	54	58	37	22
Other	15	19	32	22	33	31	29	44	21

In comparing Government and Private facilities, 36% of the respondents at Government campgrounds used a directory to learn about the site whereas 59% of the visitors at private operations stated they had been there before.

4.11 IMPORTANCE OF CAMPGROUND FACILITIES

Visitors were asked to rate the top five most important features of an RV campground. Answers are ranked according to the number of mentions each attribute received. The top five attributes mentioned were showers, picnic tables, fire pits, sani-station and beaches.

EXHIBIT 4-14

IMPORTANCE OF CAMPGROUND FACILITIES

ATTRIBUTE	# OF RESPONSES	% RESPONSES
Showers	1,013	13.2
Picnic Tables	928	12.1
Fire Pits	828	10.8
Sani-station	696	9.0
Beach	562	7.3
30 Amp Service	440	5.7
Laundromat	431	5.6
Convenience Store	372	4.8
Pull thru sites	367	4.7
Telephone	348	4.5
Pets allowed	327	4.3
Playground	251	3.3
Swimming Pool	232	3.0
Programmed Activities	201	2.6
Reservations	159	2.1
Cable T.V.	89	1.1
Clean sites	87	1.1
Recreation Building	77	1.0
Water	31	0.4
Level sites	27	0.4
Other	234	3.0
	7,700	100.0 %

The ranking of attributes changed between users of Government campgrounds and Private sites. The top ten attributes were as follows.

EXHIBIT 4-15

GOVERNMENT vs. PRIVATE CAMPGROUNDS

RANKING	GOVERNMENT	PRIVATE
1	Showers	Fire Pits
2	Picnic Tables	Picnic Tables
3	Sani-station	Showers
4	Laundromat	Beach
5	30 Amp Service	Sani-station
6	Pull-thru Sites	Pets Allowed
7	Convenience Store	Telephone
8	Fire Pits	30 Amp Service
9	Swimmi ng Pool	Playground
10	Telephone	Laundromat

Of particular importance to users of government campsites are showers, picnic tables and sani-stations, all of which are provided at the larger campgrounds. Next in order of importance are laundromats and electrical hook-ups, both of which are not provided at any B.C. Parks campgrounds. Private campground users cite fire pits, picnic tables and showers as being the most important elements. Beaches and sani-stations were ranked in fourth and fifth spot.

Another measure of the importance of campground facilities is the work done by B.C. Parks in their Satisfaction Surveys. These are annual user surveys conducted at selected parks throughout the province. The results are relevant because nearly 7 out of 10 visitor-parties were travelling in a recreational vehicle (with or without a tent).

The 1987 survey results cited the following distribution of the importance of various park and campground features. (The percentages relate to the number of persons who rated each feature as 1st, 2nd or 3rd in terms of importance.)

- Cleanliness of restrooms	56%
- Cleanliness of the individual campsite	45%
- Sense of security	43%
- Condition of campground	41%
- Control of noise	30%
- Availability of firewood	24%
- Availability of recreational facilities	21%

Another survey conducted by B.C. Parks (Public Opinion About Provincial Park Campgrounds, 1989) dealt with the reasons people preferred provincial park campgrounds. This survey indicated that the key appeals of government campsites are:

- Spacing of campsites	33%
- High standards of maintenance	23%
- Cost	9%
- Security Service	8%

This survey also monitored the degree of preference B.C. residents had for various provincial campground facilities. The following features were ranked as being either essential or desirable.

- Running or walking trails	93%
- Convenience store	62%
- Playgrounds	61%
- Boat rentals	61%
- Other water recreation equipment	61%

There is also a strong preference for B.C. Parks to be retained in their current style, cited by 75% of respondents.

By comparison, respondents indicated they preferred commercial campgrounds for:

- Advance reservations 28%
- RV hookups 15%
- High maintenance 14%
- Security 9%

4.12 EXPENDITURES

The average spending per party on the survey day by all RV users surveyed was $75.54. The lowest average expenditure was by B.C. residents at $65.62. This tended to bring the overall average down. Washington State residents spent $89.27 while offshore residents had an average expenditure for the day they were surveyed of $104.11 per party.

EXHIBIT 4-16

EXPENDITURE BY ORIGIN

ORIGIN	TOTAL SPENT DAILY (TODAY)
B.C.	$65.62
Alberta	79.05
Other Canada	95.69
Washington	89.27
Oregon	78.69
California	70.71
Other U.S.	87.80
Offshore	104.01
Total Average Expenditures	$75.54

On a per category basis, the largest expenditure item is fuel, costing $.27 out of every RV camping dollar spent. Campground fees are the third largest category at 15% after groceries spending at 19%.

EXHIBIT 4-17

PARTY EXPENDITURE BY SERVICE

	TOTAL EXPENDITURES TODAY		TOTAL TRIP EXPENDITURES	
	($)	(%)	($)	(%)
Campground Fee	10.82	14.3	124.02	14.5
Groceries	16.17	21.4	164.22	19.2
Restaurants	5.63	7.4	75.27	8.8
Entertainment/ Recreation	4.21	5.5	56.45	6.6
Shopping	9.18	12.1	98.36	11.5
Gas/Fuel	24.16	32.9	233.50	27.3
Ferry Fares	1.49	1.9	55.59	6.4
Other Accommodation	0.61	0.7	13.68	1.6
Other	2.87	3.8	34.21	4.0
Total	75.54	100%	855.30	100%

What impact does this spending in the RV Campground Industry have on the provincial economy? To calculate this impact, the total number of RV campsites available for occupancy (open for business) were tallied from the RV Operator's

Survey. These monthly totals were multiplied by average monthly occupancy rates, producing a total number of occupied site nights of 3,013,266 (for 1988). This figure was multiplied by the average per party expenditure of $76/day resulting in a total expenditure by RVers of $229 million.

Allocating this revenue to the various sectors of the economy where it was spent results in the following distribution:

- Fuel/gasoline	$61.8 million
- Groceries	43.5 million
- Campground Fees	34.4 million
- Shopping	27.5 million
- Restaurants	20.6 million
- Recreation/Entertainment	16.0 million
- Ferry Fares	13.7 million

4.13 OCCUPATION

A large proportion of RV users are retired (40%). Professional and managerial/administration were the next largest categories, at 16% and 12% respectively.

EXHIBIT 4-18

OCCUPATION OF RV USERS
(%)

OCCUPATION	
Professional	16%
Managerial/Administration	12
Sales	3
Office/Clerical	2
Technical	8
Building Trades	4
Mining/Forestry	3
Farming/Fishing	2
Transportation	2
Student	0
Retired	40
Other	8
	100%

The B.C. average by occupation was fairly consistent by origin. However, only 21% of Alberta campers were retired and a larger number were professional (23%) and technical (11%) workers. Conversely, the U.S. visitors were dominated by retirees - Oregon 56%, California 69% and other U.S. 70%. There was a corresponding decrease in professional and managerial/administration workers.

4.14 HOUSEHOLD INCOME

EXHIBIT 4-19

HOUSEHOLD INCOME BY ORIGIN

(Origin %)

	B.C.	Alta.	Other Cda.	Wash.	Ore.	Cal.	Other US	Off-shore	Total Visitors
Under $20,000	16	7	16	3	0	0	7	0	11
$20,000 to $29,999	20	13	20	22	27	22	19	17	18
$30,000 to $39,999	19	20	11	25	33	14	20	17	19
$40,000 to $49,999	21	21	14	19	20	18	20	15	20
$50,000 to $59,999	11	16	16	14	7	6	14	24	13
$60,000 & over	13	22	23	17	13	34	19	26	18
100%									

The largest income category of all Visitors to B.C. is $40,000 to $49,999, followed by the $30,000 to $39,999 range.

4.15 RV TOURISTS TO B.C.

In 1987, a survey of visitors to B.C. was conducted through the peak RVing season of July to October (Visitors' 87). A separate analysis of this survey data was run to compare the characteristics of RVers with the general travelling public.

The survey involved diaries completed by 3,225 travel parties of which 14% were using a camper/motorhome, while an unknown number of those entering by automobile were pulling a trailer. The following analysis pertains to the 14% of camper/motorhome drivers.

GENERAL OBSERVATIONS

- Over the 3 1/2 month survey period 175,000 campers/motorhomes entered the province.

- B.C. is the major destination for 55% of RVers to B.C. This is below the 62% average for all travellers to B.C.

- Of the 45% of RVers who said their major destination was not B.C., 22% said it was Alberta, 24% said it was Alaska and 38% said it was the U.S.

- 84% of RVers travelling in the Province have been to B.C. before. This is very close to the 83% of those travelling to B.C. by car but higher than the 73% for travellers in general.

- Of RVers travelling in B.C. 18% were making their first trip in three years, 14% had made one previous trip during this time, 28% had made two trips, 13% had made three trips, 12% had made four or five trips and 15% had made more than six trips. These figures are somewhat less than those recorded for automobile travellers or travellers generally.

REGION OF OVERNIGHT STAY

- RVers driving their own vehicle are more likely to visit less populated and more rural areas of B.C. - especially the Rockies and the north - than travellers generally, and significantly less likely to visit the southwest part of the province. For RVs rented in B.C., however, this pattern differs considerably. People renting RVs in B.C. are approximately twice as likely as those driving their own RV to visit Vancouver Island and southwest B.C. but are only half as likely to visit the Thompson-Shuswap, Cariboo Chicoltin, Yellowhead 16, Peace River Liard or Rockies regions.

ACCOMMODATION

- Not suprisingly, figures indicate that 83% of RVers camp while in B.C. This compares to 19% for all travellers. RVers are far less likely to stay with friends and relatives while in B.C. (8%) than travellers generally (26%).

ORIGIN

- Two-thirds (66%) of all RVers visiting B.C. come from the U.S. U.S. RVers are most likely to be from California (18%) or Washington (16%). In fact, figures indicate that visitors from California are more likely to arrive in B.C. by RV than any other form of transportation. One-quarter of RVers travelling to B.C. are from Alberta. RVers are more likely than travellers generally to be from Alberta, Washington, California and other western states and less likely to be from Ontario, other Canadian provinces and other U.S. states. Offshore visitors comprise approximately 10% of all travellers in B.C. Of these 46% travelled through the province in an RV.

PARTY SIZE AND COMPOSITION

- Close to two-thirds (64%) of RV parties travelling in B.C. are comprised of two adults. This compares to 52% for automobile travellers. Automobile travellers are somewhat more likely to be accompanied by one or two children (20%) than RVers (15%). The average total number of persons in an RV travel party is 2.7, similar to the 2.6 average for all travellers.

- On average, RVers travelling in B.C. are older than travellers generally. One-fifth (20%) are likely to be between 45 - 54, 32% are between 55 - 64 and 24% are over 65. This compares to 18%, 21% and 16% respectively for all travellers.

LENGTH OF TRIP

- RVers are likely to have spent almost twice as many nights away from home (10) before entering B.C. as travellers generally (5). The average length of time an RVer is away from home is 27 nights. This compares to 16 nights for all travellers.

ACTIVITIES

- Only 1% of RVers in B.C. are on any kind of packaged tour. This compares to 8% for travellers in general.

- RVers are somewhat more likely to make more personal trips away from home than travellers generally although they are almost twice as likely to make 11 or more trips of less than 1,000 miles than travellers generally.

- Survey results indicate that 32% of RVers travelling in B.C. go shopping, 8% take a tour, 50% go sightseeing, 32% participate in outdoor activities, 16% participate in sporting activities, 29% visit a beach/lake, 10% visit museums/galleries, 15% visit a historic site and 20% visit friends or relatives. These figures are fairly similar among travellers generally although RVers are somewhat more likely to participate in outdoor or sporting activities or to be passing through than travellers generally.

EXPENDITURES

- With the exception of automobile and grocery expenses, RV operators spend considerably less than travellers generally while in B.C. The following chart compares the average amount RVers spend on selected items with the average amount spent by travellers generally:

Daily Expenditures	RVers	Average
Accommodation	$11.64	$35.54
Auto Transportation	22.23	15.43
Other Transportation	4.21	6.58
Package/Cruise	2.32	12.43
Restaurants	10.70	26.15
Groceries/Beverages	8.78	7.51
Rec/Entertainment	4.73	5.04
Shopping/Souvenirs	7.52	18.41
Other Expenditures	3.32	4.70
	$75.45	$131.79

The above figures indicate that, on average, RVers spend 43% less per day while in B.C. than travellers generally. (They do, however, stay more than twice as long.)

INCOME

- Figures indicate that RVers are less likely to have a high income ($60,000+) than travellers generally - 22% compared to 31% - but are somewhat more likely to be in the middle to upper middle level income of $40,000 to $59,000 - 31% compared to 26%. (These figures are somewhat misleading as a disportionately high percentage of RVers are retired and no longer have employment income.)

MARKETS

- 65% of RVers in B.C. have seen B.C. travel ads. This is slightly above the 63% for travellers generally but almost equal to automobile travellers.

- Of RVers who have seen ads for travel to B.C. 75% saw them in magazines, 42% saw them on TV and 24% saw them in other sources. This compares to 67%, 41% and 26% for all travellers to B.C.

- 29% of people travelling to B.C. by RV requested information from Tourism B.C. For travellers generally this figure was 22%.

5.0 B.C. RV CAMPGROUND OPERATIONS

Performance and operations of the B.C. RV Campground Industry was determined through a survey of operators. This questionnaire was completed by 62 RV Campgrounds located through-out the province. Analysis was produced for five regions of B.C. for the year 1988.

These properties represented about 9% of the total number of campgrounds in the province and 12% of the total campsites (4,800). Sizes ranged from 14 sites to 300 sites. Figures quoted reflect a sample of at least 3 properties in any sub-category.

5.1 MANAGEMENT

The following exhibits provide information regarding the operation of RV campgrounds in B.C. Exhibit 5-1 indicates that 80% of campgrounds are owner operated and 96% are independent. The Central Interior (Okanagan region) has the highest percentage of owner operated facilities in the province while Northern facilities are most likely to have a hired manager.

EXHIBIT 5-1

MANAGEMENT AND OPERATIONS

	Vanc. Island	Lower Main.	South	Central	North	B.C.
Owner/Operator	75%	82%	70%	95%	67%	80%
Hired Manager	25%	18%	30%	5%	33%	20%
Independent	———		N.A..	———		96%
Chain/Referral Service	———		N.A..	———		4%

Exhibit 5-2 indicates that nearly two-thirds (63%) of B.C.'s RV campgrounds have been bought since 1980. Based on interviews with campground operators it is apparent RV campgrounds experience a high operator turnover. The general concensus seems to be that it is during the first few years that an operator will "make it or break it". Thus there is a distinct split between those who have been running a campground for many years and those who are just getting started.

It is also apparent that campgrounds which have been in operation for several years tend to be in a better financial position than new, or recently purchased campgrounds, because they are less likely to be carrying heavy debt.

The difficulty of getting new operations going is apparent from the figures indicating years in which B.C.'s campgrounds were developed. Thus, while almost two-thirds of B.C. campgrounds have been bought since 1980, less than one-third have been developed during this time. More than two-thirds of B.C.'s campgrounds were developed more than 10 years ago and more than one half were developed more than 20 years ago.

EXHIBIT 5-2

CAMPGROUND AGE AND OWNERSHIP CHANGES

YEARS	YEAR BOUGHT	YEAR DEVELOPED
1989	7 %	—
1988	9	2%
1987	15	2
1986	4	6
1980-85	28	21
1970-79	26	19
1960-69	4	30
1959 or earlier	7	21

5.2 MARKET AREAS

EXHIBIT 5-3

MARKET AREAS

	Vanc. Island	Lower Main.	South	Central	North	B.C.
B.C.	46%	41%	38%	40%	28%	39%
Alberta	12	14	42	29	10	24
Other Canada	5	5	7	5	7	6
Washington	15	11	4	7	11	9
Oregon	11	5	2	3	7	5
California	7	10	2	4	12	7
Other USA	2	8	4	5	14	6
Offshore	1	6	4	6	10	6

(* Numbers may not add to 100% due to rounding)

As the above table indicates, the highest percentage of RV campground business, in almost every region of the province, comes from B.C. residents. The only exception to this is the Southern Interior (Okanagan) which receives somewhat more business from Albertans than from British Columbians.

The average for all regions indicates that approximately 40% of B.C. RV campground business comes from local residents. The north is the only region where this figure varies significantly as only 28% of campground business in the north comes from B.C. residents. Instead northern properties receive most of their business from Americans and offshore visitors.

The figures indicate that visitors from all origins use RV campgrounds in each of the province's regions, although each area appears more popular for certain visitors than others. For example, the highest percentage of business produced by:

- British Columbians occurs at Vancouver Island campgrounds;
- Albertans occurs in the Southern Interior;
- Other Canadians occurs in the Southern and Northern Interior;
- visitors from Washington is on Vancouver Island;
- visitors from Oregon is on Vancouver Island;
- visitors from California is in the Northern Interior;
- visitors from Other USA is in the Northern Interior;
- and visitors from Offshore is also in the Northern Interior.

It is only in the north that combined business from all other areas exceeds that produced by British Columbians and Albertans combined.

5.3 MARKET SEGMENTS

EXHIBIT 5-4

MARKET SEGMENT

	Vanc. Island	Lower Main.	South	Central	North	B.C.
Families (with children)	24%	28%	56%	54%	25%	43%
Adults (18-55)	34	34	27	24	30	28
Senior Adults (56+)	42	38	16	23	46	30

The highest percentage of campground users are adults (58%) as opposed than families (43%). This is consistent with the trend toward an aging population and a decrease in the average family size.

Although the percentage of campground business which comes from adults between 18-55 is relatively consistent in each region, this is not the case for families and senior adults. In both the Southern and Central Interior (Okanagan/Cariboo area) the majority of campground business comes from families.

Conversely, only a small percentage of business in these areas comes from senior adults. Instead, senior adults provide the majority of campground business on Vancouver Island and in the North.

5.4 MARKETING TECHNIQUES

EXHIBIT 5-5

MARKETING TECHNIQUES

% WHICH USE	Vanc. Island	Lower Main.	South	Central	North	B.C.
B.C. Accom-modation Directory	89%	80%	90%	95%	92%	90%
Brochures	100	80	80	85	75	84
Magazines	78	40	40	30	50	44
Newspapers	78	40	40	20	25	36
Travel Shows	56	50	30	10	25	30
Radio	33	0	30	15	17	18
Direct Marketing	11	30	10	15	0	13
T.V.	22	0	10	5	17	10
All Others	33	60	40	50	25	43

B.C.'s RV campgrounds use a range of marketing techniques to publicize their facilities. The popularity of each technique varies in terms of use from region to region although the total column indicates the degree of popularity for each method provincially.

The great majority of campgrounds for example, are listed in the B.C. Accommodation Directory and produce brochures while only a small percentage use T.V., radio or direct marketing as marketing techniques.

Generally, it appears that Vancouver Island campgrounds are more likely to use each of the various marketing techniques than campgrounds in other regions, while the Central and Northern Interior are less likely to use these techniques. The Lower Mainland is more likely to use direct marketing than other areas.

When asked to identify the two marketing techniques they consider most effective, close to two-thirds of respondents identified the Accommodation Directory, 45% said 'all other forms', 42% said brochures, 15% said travel shows and 12% said magazines. There was some regional variation to these answers.

- The Accommodation Directory is the most effective on Vancouver Island;
- Travel shows are most effective on Vancouver Island;
- Magazines are most effective in the Southern and Northern Interior;
- Direct marketing is the most effective in the Central Interior.

Despite the range of marketing options available to RV campground operators, only 61% of operators surveyed indicate they have a marketing budget. This ranges from a high of 78% on Vancouver Island to a low of 40% in the Northern Interior.

Not surprisingly, campgrounds in those areas where a high percentage of facilities have a marketing budget are more likely to use a wider range of marketing techniques. For example, Vancouver Island has the highest percentage of campgrounds with a marketing budget and is also more likely to have used each of the different marketing techniques.

EXHIBIT 5-6

MARKETING BUDGETS

	Vanc. Island	Lower Main.	South	Central	North	B.C.
Have a promotional budget	78%	64%	50%	68%	40%	61%
Annual advertising costs	$3115	$3467	$2600	$1390	$2875	$2433
Prepare annual marketing plan	56%	22%	33%	20%	20%	28%

Although 61% of RV campgrounds have an advertising budget only 28% prepare a marketing plan. Campgrounds on Vancouver Island and in the Southern Interior are most likley to have a marketing plan and an advertising budget. Only one in five campgrounds throughout the rest of the province are likely to have a marketing plan while the Southern and Northern Interior are least likely to have an advertising budget.

Campgrounds spend an average of $2400 annually to advertise their facilities. Campgrounds on the Lower Mainland spend the most while those in the Central Interior spend the least.

5.5 OPERATING EXPERIENCE

EXHIBIT 5-7

LENGTH OF TIME IN BUSINESS

	Vanc. Island	Lower Main.	South	Central	North	B.C.
Less than 1 year	0%	10%	0%	10%	0%	5%
1 - 2 years	13	10	0	5	33	12
3 - 5 years	13	20	40	15	25	22
6 - 10 years	50	30	30	25	17	28
11+ years	25	30	30	45	25	33

The majority of people operating an RV campground in B.C. have been in the business for several years. Six out of ten have been in business more than six years while one-third have more than 11 years experience. Operators of campgrounds in the north are most likely to have only been in business for a short period of time while those in the Central Interior are most likely to have been in operation for a long time.

EXHIBIT 5-8

MANAGEMENT EXPERIENCE

	Vanc. Island	Lower Main.	South	Central	North	B.C.
Learned after purchase of campground	44%	50%	80%	95%	82%	75%
Seminars/training courses	33	30	10	21	9	20
Previous Experience in other campgrounds	22	40	10	11	0	15
All Other	56	40	20	37	45	39

Exhibit 5-8 indicates that 75% of people who purchase a campground have no previous experience running a campground operation. This figure is even higher in the South, Central and Northern Interior. It appears that the majority of operators come into the campground business with a range of skills, training and experience which they hope to adapt to the campground industry.

Operators of Lower Mainland campgrounds are most likely to have had previous experience operating a campground while those from the Lower Mainland and Vancouver Island are most likely to have benefitted from relevant seminars and training courses.

5.6 EMPLOYMENT

EXHIBIT 5-9

AVERAGE EMPLOYMENT

	Vanc. Island	Lower Main.	South	Central	North	B.C.
Full-time Summer	7.9	5.1	3.2	3.0	2.0	3.9
Part-time Summer	2.0	1.0	2.2	1.3	1.1	1.5
Full-time Off-season	1.6	2.9	0.7	0.9	0.6	1.2
Part-time Off-season	1.0	1.0	0.8	0.3	0.6	0.6

The majority of RV campgrounds are operated by a very small number of staff. During the summer campgrounds they have an average of approximately four full-time and 1.5 part-time workers. During the off-season most campgrounds have only one person assisting with upkeep, while another person, usually a spouse, helps out where needed on a part-time basis.

Campgrounds on Vancouver Island and the Lower Mainland have the largest number of full and part-time staff during both the summer and off-season.

On an annual basis the RV campground industry generates over 3,700 jobs throughout B.C. Taking seasonal closures into account, the industry still generates the full-time equivalent of 1,350 jobs.

5.7 OPERATING CONCERNS

Campgrounds participating in this study were asked to rank some issues which were considered to be of concern to campground operators. Respondents could rank each issue from 1 (not a problem) to 5 (very severe problem). A series of twenty-five issues were tabulated under the headings of markets, development, financial and operations.

EXHIBIT 5-10

RANKING OF OPERATOR CONCERNS

	NOT A PROBLEM				VERY SEVERE PROBLEM
	1	2	3	4	5
Competition from Private Facilities	46%	25%	20%	3%	5%
Competition from Public Facilities	27	7	25	8	32
Price Conscious Travellers	23	28	39	9	2
Fewer Tourists	40	19	16	17	9
Marketing Costs	31	5	28	19	17
Lack of Marketing knowledge	45	17	14	19	5
Construction Costs	21	7	14	35	23
Outdated Facilities	33	18	16	25	9
Lack of Recre-ational Facilities	41	11	20	20	9
Interest Rates	19	10	12	24	36
Availability of Debt Financing	36	15	16	7	25
Bankers Knowledge of RV Business	31	19	15	13	21

Availability of Equity/venture capital	29	13	23	13	21
Lack of Investment Incentives	28	14	20	16	22
Property Taxes	12	4	19	25	40
Provincial Taxes	22	7	16	25	29
Federal Taxes	22	7	13	28	30
Staff Costs	25	35	29	8	4
Availability of Trained Staff	38	9	16	25	11
Level of Staff Skills	38	19	17	23	4
Seasonality	14	12	16	25	33
Insurance Rates	15	19	14	20	32
Signage	15	17	4	22	43
Access to Supplies/Services	33	24	17	13	13

At least 60% of campgrounds surveyed stated that interest rates, property taxes and signage are severe problems facing the campground industry. These are closely followed by concerns regarding construction costs, provincial and federal taxes, seasonality and insurance rates. In addition, close to two-thirds of campgrounds stated that competition with public campgrounds is a problem, with half of these saying it is a very severe problem.

Issues not seen as serious by the majority of campgrounds include competition from private facilities, fewer tourists, lack of marketing knowledge, staff costs, level of staff skills, and access to supplies and services.

The key issues causing major problems for RV campground operators are ones which relate to finances and operating costs. The exceptions are concerns regarding signage and seasonality although, ultimately, these issues have a direct impact on revenue.

5.8 OCCUPANCY

As expected, occupancies in the RV Campground business are highly seasonal ranging from a low of zero in December, January and February to a high of 100% in July and August. The average (for those RV campgrounds that were open) was 11% in the winter and 68% in the summer. These are provincial averages calculated from properties that were open for business during the months in question. Regional averages ranged from a low of zero in the north during winter to a high of 83% in August on Vancouver Island. The annual average occupancy among campgrounds that were open for business during 1988 was 39.5%. This ranged from a low of 28% in the north to 47% in the Central Interior.

Annual occupancies have been very consistent since the mid 1980's ranging between 38% and 41%. With the short timespan and the effects of Expo '86, it is not possible to identify any trend other than the performance of the B.C. Campground Industry appears to be stable.

Seasonality is a major issue in the RV campground business. Based on the survey of operators, only 20% of properties are open all year. Approximately 40% of B.C.'s RV campgrounds are closed for seven months or more and a further 23% are closed for six months of the year.

EXHIBIT 5-11

MONTHLY OCCUPANCY
(1988)

	Vanc. Island	Lower Main.	South	Central	North	B.C.
			(Percent)			
January	9.8%	26.7%	N.A.	N.A.	1.7%	11.3%
February	10.0	26.7	N.A.	N.A.	1.7	11.4
March	13.8	22.8	N.A.	N.A.	5.0	13.6
April	23.0	26.4	N.A.	22.7	6.2	19.2
May	28.1	34.7	8.4	20.7	12.9	20.1
June	52.3	41.7	12.7	29.5	38.7	33.3
July	74.6	71.7	57.7	73.6	57.1	67.5
August	83.3	71.7	55.8	76.3	53.9	68.7
September	36.9	45.0	10.2	29.6	37.8	31.5
October	27.8	28.6	7.5	12.7	16.5	19.2
November	15.0	20.3	—	1.0	7.0	13.6
December	8.8	27.7	16.4	N.A.	N.A.	11.0
Annual	39.1%	43.5%	32.6%	47.1%	28.3%	39.5%

EXHIBIT 5-12

ANNUAL OCCUPANCY 1985 - 1988

	Vanc. Island	Lower Main.	South	Central	North	B.C.
			(Percent)			
1988	39.1%	43.5%	32.6%	47.1%	28.3%	39.5%
1987	32.7	36.0	22.0	49.9	50.0	38.1
1986	39.0	58.8	19.6	44.1	N.A.	41.0
1985	N.A.	N.A.	22.0	46.8	N.A.	39.7

5.9 REVENUES AND EXPENSES

Based on the Operators survey, just over two-thirds of the revenue generated by British Columbia's RV Campgrounds is from actual site rentals. About 10% comes from the sale of groceries and the remaining 25% is from a variety of items such as cabin rentals, boat rentals, tackle sales, tours, video games, meals, laundry, showers, vending machines and fuel. The regional distribution is as follows:

EXHIBIT 5-13

REVENUE SOURCES

	Vanc. Island	Lower Main.	South	Central	North	B.C.
RV Site Rentals	58%	70%	79%	64%	69%	67%
Groceries	4	16	6	11	4	9
Other	37	14	17	26	26	24

Gross revenues for British Columbia's RV Campgrounds average just under $100,000 (actually $98,500). This figure is based on a sample of 43 properties of varying sizes and offering a range of amenities. There is also a tremendous range of revenues from lows of only a few thousand dollars to highs of many hundreds of thousands of dollars for the larger more well equipped facilities. The average percentage of revenue generated from RV sites throughout the province is 67%.

A more accurate measure of the "typical" gross revenues is the median, or the revenue figure representing the point where one-half the revenues are below and one-half are above. This statistical measure reduces the impact created by the few businesses with large gross revenues that alter the average. The median gross revenue is $52,000.

In terms of revenue per site, the average is $1,187. This includes revenue from all sources. The measure of revenue per site based solely on site rental charges is $747.

Operating expenses for B.C.'s RV Campgrounds average about $77,500. Again, a more accurate reflection of "typical" expenses is the median which reduces the influence of the very high and very low figures. The median expense for RV Campgrounds is $40,000.

A summary of the pertinent revenue and expense figures is as follows.

EXHIBIT 5-14

RV CAMPGROUND REVENUE AND EXPENSE SUMMARY *

Average Gross Revenue	$98,500
Typical (Median) Gross Revenue	52,000
Proportion of Revenue Generated from Site Rentals	67%
Average Revenue per site (all sources)	$1,186
Average Revenue per site (site rental only)	794
Average Operating Expense	77,500
Typical (Median) Operating Expense	40,000
Average Operating Expense per site (all sources)	961
Average Operating Expense per site (site rentals only)	644

* Based on 43 RV campgrounds averaging 80.6 sites.

Operating expenses have been tallied as a percentage of total expenses (not revenues) into a series of categories. In Exhibit 5-15, figures have been recorded for the average, the range and the median. The average figure is the arithmetic mean and can be affected by the extremes. Consequently the ranges have been tallied as have the median or mid point score. The following is a brief outline and explanation of each category.

Wages and Salaries: Includes all full-time and part-time salaries paid including benefits. There is a large range in salaries because many properties do not pay salaries but rather the owners take whatever exists between revenue and expenses.

Advertising and Promotion: Includes all activities conducted by the RV Campground to market the facility. This includes brochures, directory listings, trade shows, magazine/newspaper ads etc.

Repairs and Maintenance: Includes all regular maintenance conducted.

Insurance: Includes liability and fire insurance plus other basic coverage.

Utilities: Includes electrical power, water and telephone.

Property Taxes: Taxes paid to the local or regional government.

Accounting and Legal: Fees paid to accounting firms and lawyers as required.

Licenses and Dues: Operating licenses and membership dues.

Interest Charges: Debt service costs to borrow money for operating line of credit and capital costs.

Vehicles: Costs to operate any vehicles on or off the campground.

Travel: Includes transportation costs to travel on and away from the campground.

Other/Miscellaneous: Includes all other operating expenses for the RV campground.

EXHIBIT 5-15

OPERATING EXPENSE RATIO

EXPENSE ITEM	AVERAGE	RANGE	MEDIAN
Wages and Salaries	22%	9% - 34%	20%
Advertising and Promotion	6	3 - 8	4
Repair and Maintenance	13	8 -20	10
Insurance	4	2 - 6	3
Utilities (Power, Water, Telephone)	11	8 -14	10
Property Taxes	7	2 - 9	5
Accounting and Legal	2	1 - 4	2
Licenses and Dues	2	1 - 3	1
Interest Charge	14	10 -22	4
Vehicles	7	3 -10	5
Travel	1	0 - 2	—
Other/Miscellaneous	10	8 -17	6

6.0 RV CAMPGROUND COMPARISONS

6.1 CHAIN CAMPGROUNDS

Chain campgrounds are becoming an increasingly significant component of the campground industry. Although these facilities still represent only a small percentage of total campgrounds/resorts, they generally represent the larger and more full-service properties.

In the early 1970's numerous RV Campground chains were in existence. Most of these had folded by the early 1980's. Today less than ten chains exist, varying in size from less than ten properties to over 700.

Unlike campgrounds which actually sell specific sites at one location, chain campgrounds typically offer participants the right to use the facilities and services available at any of their (member) properties. The three largest campground chain organizations are Thousand Trails, Coast to Coast and Kampgrounds of America (KOA). All have RV Campgrounds in B.C. as well as in the Pacific Northwest.

THOUSAND TRAILS

Use of Thousand Trails facilities is based on membership. Thousand Trails began selling memberships in 1972 after they opened their first resort near Chehalis, Washington that same year. They now operate 43 properties in 16 states (with one in B.C.) and service close to 100,000 member families.

Thousand Trails is a publicly owned company which has recently merged with the National American Corporation. Its property and facilities provide Thousand Trails with assets of over $200 million. The number one objective of this organization is to provide quality services and facilities to its members.

Although each resort is individually designed, common features include well-maintained campsites, all necessary utilities, clean washrooms, large family lodges, trading posts, extensive recreational and social activities, and 24 hour security and service.

People become members of Thousand Trails by responding to an invitation to visit one of the resorts. Upon joining, members pay an initial membership fee and annual dues. There are different types of membership, but generally a membership entitles the member's family to use any existing or future Thousand Trails Resort for up to two weeks per visit. Although a variety of membership categories have been used over the years, the current plan provides a lifetime membership which can be sold, transferred or willed.

The majority of members are RVers. Recently, however, several Thousand Trails properties have introduced on-site travel trailers as well as cabins to provide alternate accommodation options. The only B.C. Thousand Trails operation is located at Cultus Lake.

COAST TO COAST

The objective of Coast to Coast is also to provide quality RV camping opportunities. They also function on a membership basis and provide their members with access to a system of quality and service oriented campsites across North America. Unlike Thousand Trails, Coast to Coast does not own its own properties. Instead, properties become an affiliate of the Coast to Coast organization and, in compliance with this affiliation, agree to provide the Coast to Coast privileges offered to members. The RV campground pays a one-time charge to the Coast to Coast organization while the individual camper pays a membership fee to his "home" park plus annual dues. There are over 300,000 Coast to Coast members in North America.

Coast to Coast has also been in operation since 1972 when it started with 13 reciprocal use resorts. Members now have access to over 500 affiliated campgrounds and travel services from resort holidays to cruises. There are 10 Coast to Coast properties in B.C.

Coast to Coast has three main membership options. The first membership option is referred to as Camp Coast to Coast (CCC). This membership is aimed at people who own an RV and provides visiting privileges at over 500 affiliated resorts. These resorts provide full services and emphasize available recreational options.

The second membership is Coast to Coast International (CCI). In addition to CCC privileges, CCI members can rent condominiums, book European camping and boating holidays, and use Coast to Coast travel services. The third membership is Coast to Coast Resorts Travel Club (CCR) which combines the privileges of the above two and also permits members to rent on site trailers and cabins at over 350 locations.

KAMPGROUNDS OF AMERICA (KOA)

KOA is perhaps the best known chain campground. This organization has over 650 campground affiliates in North America, (of which 15 are in B.C.) and is also aimed at providing travellers with a full range of campground services and facilities. KOA has been in operation approximately 25 years and has provided camping services to an estimated 350 million North Americans.

Unlike Thousand Trails and Coast to Coast, use of KOA facilities does not require a membership. People can make reservations but are otherwise treated on a first come first serve basis and pay as they go. Being a member campground of KOA requires that each campground offer all the services and amenities KOA campgrounds are required to provide based on the terms and conditions of their franchise agreement.

Common features available at almost all KOA campgrounds are hot showers, full hookups, a store, a recreation room, a pool, plus a range of other recreational facilities or opportunities. In addition, some KOA campgrounds provide camping cabins. Like Coast to Coast, KOA also offers travel services which include international camping tours and providing discounts on selected travel options.

Any campground can apply to become a KOA franchise. Acceptance is based on confirmation that the campground is up to KOA standards; that the owners acknowledge their willingness to fulfill the conditions of their franchise agreement; and that they pay an annual royalty to KOA. To ensure that consistency and quality are maintained, KOA sponsors training schools, conventions, regional meetings and a nation-wide marketing program.

EXHIBIT 6-1

RV CAMPGROUND CHAINS IN NORTH AMERICA

NAME	# OF CAMP-GROUNDS	# IN BC	YEAR STARTED	OWNERSHIP	OPEN TO PUBLIC	SITES SOLD
Kampgrounds of America (KOA)	700+	15	1962	Independent	Exclusively	No
Outdoor Resorts of America	13	None	1969	Corporate	Yes	Yes
Coast to Coast	500+	10	N/A	Independent	Yes	N/A
Best Holiday Trav-L-Park Association	90	None	N/A	Independent	Yes	N.A.
Thousand Trails/ NACO	75	1	1972	Corporate	No	No

Jellystone Park Camp-Resorts and Safari Campgrounds	76	None	1969	Independent	Yes	Yes
Holiday Trails Resorts	8	6	1987	Independent	Yes	No

6.2 COMPARISON OF B.C. RV CAMPGROUNDS WITH ALBERTA, WASHINGTON AND OREGON CAMPGROUNDS

Several directories exist which list and rate RV campgrounds throughout North America. For our purposes, the Woodalls Directory was used as the source for comparisons because it actually ranked each RV campground according to their quality (using from 1W to 5W's.) Furthermore, the directory provides a separate ranking of on-site facilities (number of sites, quality, landscaping, services, etc.) plus recreational amenities (pools, playgrounds, recreation buildings etc.). All these rankings are based on personal visits by a Woodall's representative using a quantitative and qualititative set of evaluation criteria.

The directory does not contain a complete inventory of RV campgrounds because inclusion in the directory is voluntary. Also, many properties are listed but not ranked, either because they were too new to be evaluated or because they were not visited. In B.C. for example, the directory ranked 323 facilities whereas the total inventory is 686.

Exhibit 6-2 illustrates the distribution of RV campgrounds by classificiation and by province or state.

EXHIBIT 6-2

RANKING OF RV CAMPGROUNDS

	B.C.	ALBERTA	WASHINGTON	OREGON
FACILITIES (#)	323	30	227	164
W	11%	3%	—	3%
WW	49	53	38%	38
WWW	34	40	55	48
WWWW	5	3	7	10
WWWWW	1	—	—	1
RECREATION (#)	267	21	192	139
W	21%	24%	17%	24%
WW	52	43	34	50
WWW	24	33	42	23
WWWW	2	—	9	2
WWWWW	1	—	—	—

As this table illustrates, B.C. has the greatest number of commercial campgrounds of the four locations charted. Generally, the Washington and Oregon campgrounds tend to rank slightly higher in quality of facilities. Just over one-third of B.C. RV campgrounds are rated 3W while 40% of Alberta's and over one-half (55%) of Washington's campgrounds qualified for this rating as did 48% of Oregon's. The American campgrounds also generated more 4W rankings than the Canadian campgrounds, although only B.C. (3 properties) and Oregon (2 properties) have campgrounds rating 5W's.

The ratios were somewhat similar but closer for recreational facilities with one-quarter of B.C. properties rating 3W's while one-third of Alberta's attained this rating. Washington State had 42% in the 3W category while Oregon had 23%. B.C. had the only facilities with 5W recreational facilities ratings (2 properties).

Overall, B.C. has RV campgrounds covering the full spectrum of sizes and services from very small and basic to large and full-service. By far the majority (83%) fall into the average to lower-average category. This concentration is even more pronounced in the other locations with Alberta 93%, Washington 93% and Oregon 86%.

Through a separate set of secondary sources it has been possible to compare several aspects of RV campground operations. The reader is cautioned that the sources used for this comparison were surveys conducted for different purposes and in different years.

However, according to these sources, B.C. campgrounds tend to be smaller than those in Alberta and Washington, or in the U.S. The proportion of serviced sites (any combination of sewer, water and power) is generally in the vicinity of 65%, with the remaining one-third being unserviced or tent sites.

In terms of employment, the smaller size of B.C.'s RV campgrounds requires fewer employees with 4 full-time summer personnel and 2 part-time. Alberta and U.S. campgrounds tend to employ about 5 persons full-time (in the summer) and 7 persons part-time.

Campsite fees are fairly consistent although U.S. campsites tend to be somewhat more costly. B.C.'s basic fees are $11.50 compared to an average of $11.80 in Alberta. Fees in the U.S. average $13.20CAN in Washington, $13.00CAN in Oregon and over $18.00CAN throughout the United States. These rates are an average of the range of base rates charged for 2 people with one vehicle. Additional charges for extra services and extra people apply.

Occupancies are more difficult to compare because of the varying seasons. However, four month (June - September) occupancies in B.C. average just over 50% compared to 48% in Alberta. Weekday and weekend day occupancies in the U.S. vary between 46% and 73%, for a weighted average of 54% for the summer period.

Revenues are also difficult to compare based on the varying number of sites, occupancies and fees. B.C.'s average revenue is just under $100,000 (actually $98,500) while Alberta's average revenue is $92,000. The American average is dramatically higher at $504,000U.S. reflecting the larger campgrounds, higher occupancies, longer season and more revenue centres.

These figures are charted below.

EXHIBIT 6-3

COMPARISON OF AVERAGE RV CAMPGROUNDS

	ALBERTA	WASHINGTON	US AVERAGE	B.C.
NUMBER OF SITES	106*	74	148	57
SERVICED SITES (%)	58%	70%	—	65%
EMPLOYEES:				
Full time (Seasonal)	6	2	5	4
Part time	7	6	7	2
CAMPSITE FEES (CAN $)	$11.80*	$13.20*	$18.00	$11.50*
PEAK SEASON OCCUPANCY:				
Weekend	48%	72%	73%	50%
Weekday		62%	46%	
Average Revenue	$92,000	$125,000	$504,000	$99,000
Average Expenses	$71,000	—	$389,000	$76,000

6.3 LESSONS LEARNED FROM SUCCESSFUL CAMPGROUNDS

Part of the analysis for this report involved a more detailed look at several successful campgrounds in the Pacific North West. This was undertaken to determine the factors which have made these RV campgrounds successful so that these lessons could be applied to B.C. properties. Ideally these lessons should be helpful for both existing and future RV campground developments.

Campgrounds chosen for comparisons were selected through personal observation and by recommendations by the Washington Resorts and Campgrounds Association and the California Travel Park Association. Selected RV campgrounds were included in this comparison based on consideration of their size (small and large), location (urban and rural), type (destination and overnight), and amenities (full service and basic). The key determinant for their inclusion was their market success.

* Woodall's Directory - Tally and average of all rates.

The RV campgrounds reviewed were:

- Tahoe Valley Campground, South Lake Tahoe, California
- Lake Siskiyou Campground, Mount Shasta City, California
- Casini Ranch Family Campground, Duncan Mills, California
- San Francisco North Petaluma KOA, Petaluma, California
- Holiday Hills Trailer Resort, Depoe Bay, Oregon
- Arizona Beach Campground, Gold Beach, Oregon
- Woodburn I-5 RV Park, Woodburn, Oregon

Also included in the assessment of what makes an RV Campground successful were reviews of a variety of studies, reports and trade journals describing various aspects of the RV industry. These sources addressed a variety of topics providing insights into the strengths and weaknesses of numerous RV Campground operations.

Two other sources of information were the surveys of B.C. RV Campgrounds and the surveys of RV Campground users in B.C. The former survey included detailed analysis of 62 properties located throughout the province. The latter involved over 1,200 questionnaires completed by RVers at over 30 public and private campgrounds located in all regions of the province.

Size: Generally the successful campgrounds are larger than average ranging from 100 sites to over 400. Size is a partial determinant of success as the investment in related recreational and service facilities can be spread over a greater number of sites. Also economies of scale arise in marketing and staffing. Size must still relate to markets but generally the larger developments tend to be more successful.

Services: Successful RV campgrounds tend to offer a mix of serviced sites and not necessarily all are serviced (to allow for tenters). However, the sites most in demand are those with sewer, power and water. There is an increasing demand for 50 amp power service, telephone connections and cablevision connections. These are usually priced separately.

Amenities: The mix of amenities on-site is an important ingredient for success. RV travellers, like most tourists, are becoming more sophisticated and are expecting more services. Important features of the successful RV Campgrounds are:

- **Convenience Store**: Stocked with convenience groceries and basic RV items.
- **Picnic Tables**: Solid and well constructed.
- **Fire Pits**: Still a basic requirement for "camping". Many RV Campgrounds charge for wood.
- **Swimming Pool**: Becoming a necessity for all RV Campgrounds attempting to offer a "resort" experience. Can be indoor or outdoor depending on markets and climate.
- **Sani-Station**: Easily accessible and preferably free.
- **Pull Through Sites**: These sites require more area but are in heavy demand for 5th wheel and large travel trailers. Most successful RV Campgrounds have a portion of pull-throughs.
- **Programmed Activities**: From a resort experience perspective, entertaining visitors with programmed activities is becoming increasingly popular.
- **Reservations**: Virtually all successful RV Campgrounds accept reservations.
- **Laundromat**: Efficient, commercial quality washers and dryers.
- **Recreation Building**: Scaled to the size of the development and containing showers/laundromat (often in a separate building), games room, sitting lounge and swimming pool.

- **Pets:** A large number of RVers travel with pets, particularly dogs. Most RV Parks allow pets but their acceptance needs to be balanced against the annoyance caused to others.
- **Playgrounds:** Simple, safe children's play area.

Operations: With the exception of Thousand Trails, most successful RV campgrounds are privately owned although they could be affiliated with a chain, usually Coast to Coast or KOA.

Location: As with most tourist accommodations, location is critical. Depending on markets, successful RV Campgrounds are either located on a major highway, near a major population centre, or in a resort/recreation area. Regardless of the location, most successful RV Campgrounds are located near natural or man-made attractions, or activities/events of significance.

Marketing: Virtually all successful RV Parks are actively promoted with an ongoing and intelligent marketing campaign. A variety of techniques are used but the most common are RV directories, tourist guide books, and brochures. All have consistent word of mouth advertising while some have found specialized RV trade shows successful.

Management: Professional, business-like management is critical to success. Equally as important is the hiring and training of competent and hospitable staff.

Value for Money: A common feature of the more successful RV campgrounds is that they provide value for money. They may be charging a variety of prices but the quality of the operations and the range of amenities reflect value for the RVer.

APPENDIX

APPENDIX

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APPENDIX B

VACATION COST COMPARISON

As Section 4.12 on expenditures makes clear, RV operators spend less while on vacation than other travellers. These findings confirm conclusions contained in other studies that travelling with a trailer or motorhome is cheaper than travelling by any other mode of transportation.

There are two major studies which deal with this issue. One is a cost comparison study of typical travelling vacations completed in Canada by Woods Gordon in 1981, and updated again in 1983 and 1989. The other is also a cost comparison study of vacations using RV's versus other types of vacations, completed in the U.S. by Pannell Kerr Forster (PKF) in 1985.

The Woods Gordon study compared four different modes of travel including:

- auto and trailer;
- motorhome;
- auto and motel;
- air travel and hotel.

Three different travel scenarios were considered - a two week vacation covering 2,500 miles, a two week vacation covering 800 miles, and a three day weekend covering 700 miles. The study confirmed that vacations in RVs cost an average of 43% less than comparable car/motel vacations and 65% less than air/hotel vacations.

The most economical way to travel was with a car and trailer while the second most economical way was with a motorhome. As noted, this study was updated in 1983 and 1989. In both cases (although the overall figures were higher due to the increased cost of living) the percentages remained largely the same.

The PKF study involved cost comparisons of eight different vacation types. The costs analyzed compared major vacation expenses including fuel, round trip fare, restaurant meals, groceries, rental cars, campsite fees and motel/hotel costs. It did not include consideration of capital costs such as the purchase of an RV.

As with the Woods Gordon report, the PKF study found that camping vacations using different types of RV's ranked as the top four most economical types of vacation among the eight studied regardless of distance, duration or area. The findings indicated that even the most expensive RV vacation is only about one-half the cost of a comparable car/hotel vacation, about one-third the cost of comparable bus/hotel and train/hotel vacations and about one-fourth the cost of a comparable air/hotel vacation.

Table One provides a breakdown of the cost of different types of vacation of varying lengths for a family of four (1985 information in U.S. dollars) as contained in the PKF report.

TABLE 1

COST COMPARISON: VACATIONS USING RECREATIONAL VEHICLES VERSUS OTHER TYPES OF VACATIONS

Vacation Type Transport Mode/Accommodation	Trip Duration 2 Night	 8 Night	 16 Night
A. Car/Folding Camping Trailer	$130	$ 436	$ 833
B. Light Duty Truck/Truck Camper	147	483	925
C. Motorhome	158	512	977
D. Car or Truck/Travel Trailer	165	516	977
E. Car/Motels or Hotels	287	1,055	1,927

F. Intercity Bus/Motels or Hotels	474	1,527	2,694
G. Train/Motels or Hotels	417	1,534	2,732
H. Airline/Motels or Hotels	808	1,946	3,393

Source: Pannell Kerr Forster.

Table Two summarizes typical 1989 travel costs for a family of five (Canadian dollars) from the Woods Gordon study.

TABLE 2

Vacation Type	Trans-portation	Accom-modation	Meals	Total
Two Week - 2,500 miles return				
Auto & Trailer	$1,149 *	$ 144	$ 437	$1,730
Motorhome	2,540	144	437	3,121
Auto & Motel	327	1,432	1,680	3,439
Air & Hotel	2,136	1,432	1,689	5,257
Two Week - 800 miles return				
Auto & Trailer	$ 819 *	$ 152	$ 437	$1,408
Motorhome	1,895 *	152	437	2,484
Auto & Motel	109	1,432	1,680	3,221
Air & Hotel	1,544	1,432	1,680	3,221
3 Day - 800 miles return				
Auto & Trailer	$ 116	$ 39	$ 138	$ 293
Motorhome	144 **	39	138	321
Auto & Motel	82	331	360	773
Air & Hotel	1,121	331	360	1,812

* Includes RV Rental Costs.
** Assumes ownership of RV - no Rental Costs included.

APPENDIX C

RV MANUFACTURING IN B.C.

There are nine RV manufacturing firms in British Columbia. These firms are located either in the Greater Vancouver area or the Okanagan. Together these firms produce a range of RVs and RV products including van conversions, motorhomes, fifth wheels, travel trailers and campers.

The length of time each firm has been in business ranges from 5 - 23 years although the average is about 14 years. The firm which has only been in business five years produces van conversions - a product which is relatively new to the market. Surveyed firms made the general observation that it is, and will continue to be, difficult for new manufacturing companies to set up and control enough market share to be viable.

The RV manufacturing industry in B.C. directly employs between 550 - 600 people - including production and office/ administration positions. Although it was difficult to obtain current sales and payroll figures, 1986 data provides the following information:

Number of paid hours (production)	$657,306
Total wages (production/administration)	9,303,399
Cost of fuel and electricity	360,361
Cost of materials and supplies	32,991,211
Value of shipments	53,849,823
Value added	18,939,434

Each firm surveyed indicated that, with the exception of this year, business has been increasing over the last few years. As a result it is likely that the above 1986 figures have increased as well.

Most of the RV products produced in B.C. are destined for markets in Western Canada - with the majority going to B.C. and Alberta. Only two firms make more than limited sales to the U.S. Both these firms indicate that sales to the U.S. have dropped off noticeably this year - largely due to the rising value of the Canadian dollar. Only one firm currently sells its products overseas. This firm indicates that it has decided to begin actively developing/expanding these overseas markets - especially Japan.

B.C. RV manufacturers appear positive about the future outlook of their industry. Firms seem confident regarding the quality of their products and are hopeful their market share will either remain constant or gradually increase. One firm indicated it is currently working to full capacity but that its expansion capability is limited by space restrictions.

Several firms expressed concern over the potentially negative impact of increasing interest rates and the improved value of the Canadian dollar. The former increases vehicle financing costs while the latter decreases U.S. sales. The impact of Free Trade seems positive as firms can import goods used to build RVs at lower rates thus reducing the overall costs of production.

There appears to be two key issues affecting the ability of the RV manufacturing industry to remain competitive in B.C. When 'Vanguard' (formerly a B.C. based manufacturing firm) was sold, it was given a government subsidy as an incentive to relocate in Saskatchewan. The subsidy enabled the firm to lower prices in an effort to win a larger market share. As a result, several smaller firms have been hurt while the other, larger firms, continue to find it difficult to match Vanguard's pricing structure. The second problem is the difficulty B.C. firms have remaining competitive with manufacturing firms in Eastern Canada.

APPENDIX D

B.C. RV RENTAL BUSINESS

The B.C. rental business is currently enjoying a period of strong economic growth. Surveyed firms consistently responded that the future outlook for rental business appears promising. The majority of RV rental firms are located in Greater Vancouver (30) and Victoria (6) although there are rental units available from a number of RV companies throughout the province. The size of RV rental fleets ranges from just a few to over 100. Almost all of the larger fleets are based in the Vancouver area.

SEASONALITY

Well over 70% of rental business occurs between May and September with the peak period being July and August. The majority of firms indicate that demand for rental units far exceeds supply during these two months. Nevertheless, poor shoulder and off-season business means it would not be practical for these firms to expand their fleet to meet summer demand.

Although some effort is being made to promote off-season business the general concensus is that the strength of the RV rental business will continue to be summer demand. Some smaller firms even opt to take their fleet off the road during the winter.

MARKETS

The majority of customers renting an RV from a smaller, non-Vancouver based firm are locals. The remaining 10 - 20% of these renters are tourists - mostly from Germany, the U.K., the U.S. and Alberta, or are locals who have overseas friends or relatives visiting.

The market for the larger firms differ considerably. Although off-season renters from these firms are also largely locals, at least 50% of their summer clientele is from overseas. For one Vancouver firm this figure was almost 100%. The greatest number of overseas renters are from Switzerland, Holland and Japan, as well as Alberta, Ontario and the U.S.

FUTURE OUTLOOK

B.C. RV rental firms are in general agreement that the future for their business looks promising. Most firms appear hopeful that they will be able to gradually increase the size of their fleet to keep up with demand. However, they do not expect off-season business to improve significantly.

Specific views regarding future market areas and market segments differ from firm to firm. Some believe that their target markets will stay largely the same. This is particularly true for those firms with a high percentage of overseas clients. Others feel the business will see an increase in local and American traffic and in long-term rentals. One firm on Vancouver Island indicated they hope to tap an increasing number of fishermen and hunters who come to the area during the fall.

CONCERNS

RV rental firms identify a number of concerns which affect their business. These include:

- Taxes (sales tax, Federal manufacturing tax etc.): Generally makes doing business more expensive and affects ability to be competitive.

- Shortness of the Season: Shortness of the season means profit must be made during the summer only. Difficult to justify expansion of the fleet despite summer demand.

- Insurance Rates: Insurance rates for RVs are high. Firms note that their rental units are penalized by high rates. Firms with only a few rental units are particularly affected by high insurance rates as they need to have five vehicles to qualify for fleet rates.

- Interest Rates: If interest rates keep going higher it will make it increasingly difficult to purchase vehicles for rental purposes.

- Exchange Rates: A lesser concern for those firms with a high percentage of overseas clients. A high currency exchange rate makes the cost of renting an RV less attractive.

RECENT TRENDS

The RV rental business has reflected a trend of steady growth during recent years and it appears that more people are becoming aware of, and enjoying, the option of renting an RV.

Generally, the smaller RVs (19 - 21') seem to be the most popular, although this depends on the number of people renting the unit. Europeans are most likely to request smaller, fully self-contained units, while locals are most likely to rent the larger units. The popularity of van conversions as a rental option appears to be declining.

The type of people renting RVs varies although feedback indicates that a high percentage of local renters are families with children while a high percentage of overseas renters are couples between 40 - 60. There are very few seniors who rent although, as survey results indicate, this could be because many of them own their own RV.

RV RENTAL CUSTOMER FEEDBACK

RV rental firm operators indicate they have received feedback from their clients regarding the Province's campgrounds. Although visitors appear generally satisfied the following lists some of the consistent observations made by RV rental company clients.

- The price of gas is very high
- B.C. Parks are not as well equipped as they used to be - i.e. lack of wood
- Private campgrounds are too expensive for what they provide
- Private campgrounds always seem to be located in a busy area - thus noise levels are high
- A key concern is that campground washrooms are clean
- Europeans prefer provincial campgrounds to private ones because of the wide space between sites and privacy
- Picnic tables, fire pits and the friendliness of hosts are very important
- For Europeans, amenities such as pools are not that important - they prefer trees and natural settings
- Some desire for multilingual staff at campgrounds expressed by Europeans.

APPENDIX E

B.C. RV CAMPGROUND OPERATORS SURVEY

In the spring of 1989 a survey was initiated of a sample of Recreational Vehicle campgrounds in B.C. The sample was drawn from the inventory produced as an earlier part of this study. Based on the inventory of 686 commercial properties in the province a one-quarter sample was selected. The sample of 150 was selected based on every fourth RV Campground in the listing. This selection process was refined by considering adequate coverage of:

- urban and rural properties
- older and newer properties
- large and small properties
- basic and full-facility properties
- overnight and destination properties.

Questionnaires were sent out with a cover letter from the Economic Planning Group and from the B.C. Motels, Campgrounds, Resorts Association. Non respondents were telephoned to request their cooperation. Sixty-two questionnaires were returned for a response rate of 41%.

9.0 **OCCUPANCY:**
Please indicate your monthly occupancy for 1988. Occupancy relates to the number of sites rented as a percentage of total sites available per month. If your facility was not open, write closed in the first column.

9.1 Monthly Occupancy: (1988)

MONTH	NUMBER OF SITES AVAILABLE	PERCENTAGE OCCUPANCY	MONTH	NUMBER OF SITES AVAILABLE	PERCENTAGE OCCUPANCY
January	_____	_____ %	July	_____	_____ %
February	_____	_____ %	August	_____	_____ %
March	_____	_____ %	September	_____	_____ %
April	_____	_____ %	October	_____	_____ %
May	_____	_____ %	November	_____	_____ %
June	_____	_____ %	December	_____	_____ %

9.2 What were your annual occupancies for:

1988 _____ % with _____ sites 1986 _____ % with _____ sites

1987 _____ % with _____ sites 1985 _____ % with _____ sites

9.3 Would you be willing to participate in a future monthly occupancy monitor? (**Please note:** All information would be kept in confidence and published in regional summaries.) Yes ☐1 Maybe ☐2 No ☐3

10.0 **REVENUES AND EXPENSES**

10.1 What is your typical RV campground revenue breakdown, by source? (Use an average of the last two or three years, if easier.)

R.V. Sites _____ %

Groceries _____ %

Others (specify) _____ _____ %

100%

10.2 What is your total annual gross revenue? (Use an average or typical recent year.) $ _____

10.3 What is your total annual operating expense? $ _____

10.4 What is the breakdown of your RV campground's operating expenses as a percentage of your total expenses? If easier, indicate the actual expenses in dollars. (Again, use an average or typical year, if easier.)

Wages and salaries (including benefits)	$ _____	or	_____ %	1
Advertising and promotions	$ _____	or	_____ %	2
Repair and Maintenance	$ _____	or	_____ %	3
Insurance	$ _____	or	_____ %	4
Utilities (Power, water, telephone)	$ _____	or	_____ %	5
Property Taxes	$ _____	or	_____ %	6
Accounting and Legal	$ _____	or	_____ %	7
Licences and Dues	$ _____	or	_____ %	8
Interest Charges	$ _____	or	_____ %	9
Vehicles	$ _____	or	_____ %	10
Travel	$ _____	or	_____ %	11
Other	$ _____	or	_____ %	12
Total of all Operating Costs			100%	

Thank you for your cooperation. Please return this form to:
Mr. G. David Hall
Economic Planning Group,
765 Sea Drive, Brentwood Bay, B.C. V0S 1A0
Telephone (604) 652-1714

BRITISH COLUMBIA RV CAMPGROUND/RV RESORT SURVEY

INTRODUCTION:

Name of Facility _____ Owner's Name _____

Address _____ Manager's Name _____

_____ Person Completing Survey _____

_____

Phone No _____ Fax No _____ Date _____

1.0 **FACILITY DESCRIPTION:** (Please fill in the blanks with the appropriate number)

1.1 Total number of sites _____

1.2 Number of sites with sewer, power and water _____

1.3 Number of sites with partial services _____

1.4 Number unserviced sites _____

1.5 Total number of units (motel/cabins etc.) _____

1.6 Other Amenities: (Check all that are on the property)

Convenience Store	☐a	Cable TV	☐i	Laundromat	☐p
Picnic Tables	☐b	Pull Thru Sites	☐j	Recreation Building	☐q
Fire Pits	☐c	30 Amp Service	☐k	Showers	☐r
Swimming Pool	☐d	Programmed Activities	☐l	Pets Allowed	☐s
Sani-Station	☐e	Telephone	☐m	Playground	☐t
Beach	☐f	Reservations	☐n	Other _____	☐u

2.0 **OPERATIONS:** (Please check the appropriate box)

2.1 Owner/Operator ☐1 or Hired Manager ☐2

Independent ☐3 or Chain/Referral Service ☐4

Year Bought? 19 _____ (approximate if unknown)

Year Built? 19 _____ (approximate if unknown)

3.0 **MARKETS:** (Please estimate the percentage of your RV Campground's annual business which comes from the following categories. Please use your **average** breakdown over the last two or three years as measured in party-nights.)

3.1 **Market Areas:**

B.C. Residents _____ %

Alberta _____ %

Other Canada _____ %

Washington _____ %

Oregon _____ %

California _____ %

Other U.S.A. _____ %

Offshore _____ %

100%

3.2 **Market Segments:**

Families (with children) _____ %

Adults (18 - 55 years) _____ %

Senior Adults (56+ years) _____ %

100%

4.0 MARKETING:

4.1 Which of the following techniques do you use to market your RV facility? (Check all that apply)

Brochures	☐1	Radio	☐5
Newspaper	☐2	TV	☐6
Magazines	☐3	Direct Marketing	☐7
B.C. Accommodation Directory	☐4	Travel Shows	☐8

Other (describe) _____

_____

4.2 Please circle the two techniques above which you consider to be most effective.

4.3 Do you have an advertising (promotional) budget? Yes ☐1 No ☐2

4.4 If yes, approximately how much would you spend annually? $ _____

4.5 Do you prepare an annual marketing plan (i.e. a written description of what marketing activities you anticipate for the next year)? Yes ☐1 No ☐2

5.0 DEVELOPMENT:

5.1 Have you renovated or expanded your RV Campground/Resort in the last two years (1988 or 1989)? (This refers to improvements other than regular maintenance.) Yes ☐1 No ☐2

5.2 If yes, please describe the renovation/expansion and estimate the cost _____

_____

Cost $ _____

5.3 Are you planning a renovation or expansion in the next two yeas (1990 or 1991)? Yes ☐1 No ☐2

5.4 If yes, please describe the renovation/expansion and estimate the cost _____

_____

Cost $ _____

6.0 MANAGEMENT:

6.1 How long have you been in the campground business? _____ years.

6.2 How did you acquire your management experience? (Please check all that apply)

- learned after purchase of this campground	☐1	- other (specify)	☐4
- previous experience in other campground	☐2	_____	
- seminars or training courses (specify)	☐3	_____	

_____

6.3 To which industry organizations do you belong? (Check all that apply)

- Regional Tourism Association	☐1	- B.C. Motels, Campgrounds, Resorts Association	☐3
- Chamber of Commerce	☐2		

- Other (specify) _____

_____

_____

7.0 EMPLOYMENT:

How many persons does your RV campground or the RV portion of your business employ, including yourself and family members

7.1 SUMMER (June - September)		7.2 FALL/WINTER/SPRING	
Full-Time	_____	Full-Time	_____
Part-Time	_____	Part-Time	_____

What was your total payroll cost for 1988 (or the closest fiscal year)? (Include salaries, wages and benefits for all staff including yourself and other family members.) $ _____

8.0 OPERATOR OPINIONS:

8.1 In your opinion, what are the three greatest problems facing your campground? (Please list in order of most important to least important.)

1. _____
2. _____
3. _____

8.2 Operator Rankings:

Here are some issues which may or may not be a concern to you in the operation of your RV campground. For each of the following issues please indicate how significant each issue is to your RV campground. (Please circle the number that best matches your opinion.)

Market/Marketing:	Not a Problem				Very Severe Problem
- Competition from private facilities	1	2	3	4	5
- Competition from public facilities	1	2	3	4	5
- Price conscious travellers	1	2	3	4	5
- Fewer tourists	1	2	3	4	5
- Marketing costs	1	2	3	4	5
- Lack of marketing knowledge	1	2	3	4	5
- Other issues (specify) _____	1	2	3	4	5
_____	1	2	3	4	5
Development:					
- Construction Costs	1	2	3	4	5
- Outdated facilities	1	2	3	4	5
- Lack of recreation facilities	1	2	3	4	5
- Other issues (specify) _____	1	2	3	4	5
_____	1	2	3	4	5
Financial:					
- Interest Rates	1	2	3	4	5
- Availability of Debt Financing	1	2	3	4	5
- Bankers knowledge of RV business	1	2	3	4	5
- Availability of equity or venture capital	1	2	3	4	5
- Lack of investment incentives	1	2	3	4	5
- Property taxes	1	2	3	4	5
- Provincial taxes	1	2	3	4	5
- Federal taxes	1	2	3	4	5
- Staff costs	1	2	3	4	5
- Other issues (specify) _____	1	2	3	4	5
_____	1	2	3	4	5
Operations:					
- Availability of trained staff	1	2	3	4	5
- Level of staff skills	1	2	3	4	5
- Seasonality	1	2	3	4	5
- Insurance rates	1	2	3	4	5
- Signage	1	2	3	4	5
- Access to supplies and services	1	2	3	4	5
- Other issues (specify) _____	1	2	3	4	5
_____	1	2	3	4	5

APPENDIX F

B.C. RECREATIONAL VEHICLE CAMPERS SURVEY

Concurrent with the RV Campground Operators Survey a survey of RV users was conducted. This involved a series of private and public sector campgrounds that acted as the agents in distributing this self administered questionnaire.

A total of nearly 6,000+ questionnaires were distributed with 4,000 going to 24 private campgrounds and 2,000 going to 12 B.C. Parks campgrounds. Park management was asked to distribute 10 questionnaires per day, one day a week for sixteen weeks throughout the camping season from late May to early September on pre-selected days.

Questionnaires were returned to the campground office, batched up on a monthly basis and sent to the Economic Planning Group. Final returns totalled 1,329 with 60% from the private campgrounds and 40% from B.C. Parks campgrounds. Approximately three-quarters of respondents completed their name and address in order to receive a scenic poster of British Columbia.

BACKGROUND ON YOUR TRAVEL PARTY

1. Where is your home? _____ (City) _____ (Prov. State)

2. How many people are in your party (vehicle)? _____

3. Into what age groups do the members of your party fall? (Please indicate the number of people in each category)

	Males	Females
Under 15		
15 - 18		
19 - 24		
25 - 34		
35 - 44		
45 - 54		
55 - 64		
65 +		

ABOUT YOUR RV CAMPING TRIP

4. What type of Recreational Vehicle are you using?
   - Full Size Motor Home (Class A) ☐ 1
   - Van Conversion (Class B) ☐ 2
   - Mini Motor Home (Class C) ☐ 3
   - Truck and Camper ☐ 4
   - Travel Trailer ☐ 5
   - 5th Wheel Trailer ☐ 6
   - Tent Trailer ☐ 7
   - Other (specify) _____ ☐ 8

5. Is this RV owned, rented or borrowed?
   Owned ☐ 1 Rented ☐ 2 Borrowed ☐ 3

6. How many nights will you be away from home on this RV camping trip? _____ nights

7. How many nights will you spend in British Columbia on this trip) _____ nights

8. How many nights will you be staying in this campground? _____ nights

9. How many different campgrounds do you anticipate staying in on this trip? _____

10. How many separate RV trips and nights away from home do you anticipate taking in 1989?
    Number of trips _____
    Total number of nights away _____

11. What activities have you participated in or do you anticipate participating in on this trip in British Columbia? (Check all that apply)

Activities		Visited		Attended	
Shopping	☐ 1	Beach	☐ 8	Sporting Event	☐ 14
Sightseeing	☐ 2	Museum / Gallery	☐ 9	Festival / Fair	☐ 15
Boating	☐ 3	Historic Site	☐ 10	Cultural Event	☐ 16
Fishing	☐ 4	Gardens / Park	☐ 11	Other (specify)	☐ 17
Swimming	☐ 5	Friends / Relatives	☐ 12	_____	
Wildlife Viewing	☐ 6	Other (specify)	☐ 13		
Other (specify)	☐ 7	_____			
_____					

12. What is the **main** purpose of this RV trip? (Check one only)
    - To go camping ☐ 1
    - Fishing ☐ 2
    - Other Outdoor Activities (specify) _____ ☐ 3
    - Visiting Friends / Relatives ☐ 4
    - Sightseeing / Touring ☐ 5
    - Other (specify) _____ ☐ 6

13. How would you rate your satisfaction with the following: (please circle the number which best matches your opinion)

	Very Dis-Satisfied				Very Satisfied	Don't Know
B.C.'s Commercial Campgrounds	1	2	3	4	5	X
B.C.'s Provincial Campgrounds	1	2	3	4	5	X
National Campgrounds in B.C.	1	2	3	4	5	X

14. Please indicate the amount of money your party spent or will spend **today** and the **total** you anticipate spending in B.C. on this trip. (Canadian funds)

	Today	Total will spend in B.C.
Campground Fees	$ _____	$ _____
Groceries	$ _____	$ _____
Restaurants	$ _____	$ _____
Entertainment / Rec.	$ _____	$ _____
Shopping	$ _____	$ _____
Gas / Fuel	$ _____	$ _____
Ferry Fares	$ _____	$ _____
Other Accommodations	$ _____	$ _____
Other	$ _____	$ _____
Total	$ _____	$ _____

15. How did you find out about this campground?
    - Been here before ☐ 1
    - Word of Mouth ☐ 2
    - Directory (name) ☐ 3 _____
    - Other (specify) ☐ 4 _____

16. Why did you chose to stay at this campground? _____

17. What do you consider to be the most important features of an RV campground? (Please rank the top 5 features in order of importance 1 to 5 and check any others that apply.)

Convenience Store	☐ 1	Programmed Activities	☐ 10
Picnic Tables	☐ 2	Telephone	☐ 11
Fire Pits	☐ 3	Reservations	☐ 12
Swimming Pool	☐ 4	Laundromat	☐ 13
Sani-Station	☐ 5	Rec. Bldg.	☐ 14
Beach	☐ 6	Showers	☐ 15
Cable TV.	☐ 7	Pets Allowed	☐ 16
Pull-Thru Sites	☐ 8	Playground	☐ 17
30 Amp Service	☐ 9	Other _____	☐ 18

ABOUT YOURSELF (or the main RV driver)

18. What is your occupation?

- Professional ☐ 1
- Managerial/Administration ☐ 2
- Sales ☐ 3
- Office/Clerical ☐ 4
- Technical ☐ 5
- Building Trades ☐ 6
- Mining/Forestry ☐ 7
- Farming/Fishing ☐ 8
- Transportation ☐ 9
- Student ☐ 10
- Retired ☐ 11
- Other _____ ☐ 12

19. Which of the following describes your annual household income before taxes in 1988? (in Canadian funds)

Under $20,000	_____	$40,000 to $49,999	_____
$20,000 to $29,999	_____	$50,000 to $59,999	_____
$30,000 to $39,999	_____	$60,000 and over	_____

20. If you have any other comments that would help us improve B.C. campgrounds for RV users please jot them down here.

_____

_____

_____

_____

_____

_____

Thank you for your cooperation. Please return this form to the Campground office. Have a good trip!

If you would like to receive a free Super Natural scenic poster, please fill in your name and mailing address.

_____

_____

_____

_____

NOTE: If you take this form away by mistake it can be mailed to:

The Economic Planning Group
765 Sea Drive
Brentwood Bay, B.C.
V0S 1A0

1853

CAMPGROUND: _____

DATE: _____

BRITISH COLUMBIA RECREATIONAL VEHICLE CAMPERS SURVEY

The British Columbia Recreational Vehicle Campground Industry is conducting this survey to determine the profile of RV campground users. Your cooperation in completing this questionnaire would be appreciated so that we can better understand our guests' requirements. Please complete this survey and return it to the registration office before you leave.

All your responses will be kept in the strictest confidence and will be used for statistical purposes only. Your name is not required, but as a token of our appreciation for completing this survey we would like to send you a B.C. scenic poster, suitable for framing. If you would like to receive this gift please provide your mailing address at the end of this survey.

APPENDIX G

RV TRADE PUBLICATIONS

Campgroundata, The National Newsletter for Campground & RV Park Buyers and Sellers, 223 E. Stuart Avenue, Lake Wales, FL 33853 (6 times/year) $30.00 (813) 676-0009.

Canadian RV Dealer, CRV Publishing Co., 2077 Dundas St., E., Suite 202, Mississauga, Ontario, Canada L4X 1M2 (7 times/year) $11.00/year (416) 624-8218.

Merchandising Magazine, 203 North Wabash, Suite #800, Chicago, IL 60601 (monthly) Free to the industry (312) 236-3528.

MH/RV Builders News, Dan Kamrow & Associates, P.O. Box 72367, Roselle, IL 60172 (6 times/year) $10.00/year $2.00 per sinlge copy (312) 893-8872.

Recreation News, Innovative Marketing, Inc., P.O. Box 912, Meredith, NH 03253 (6 times/year) $24.95.

Rental Management Monthly, Rental Management Systems, 1201 Baldwin Park Blvd., Baldwin Park, CA 91706 (monthly) Free to the industry (818) 962-6907.

RV Business, TL Enterprises, Inc., 29901 Agoura Road, Agoura, CA 91301 (semi-monthly) $48.00/year (818) 991-4980.

RV Business Annual RV Industry Directory, (Guide to RV Manufacturers, Suppliers, and related services), TL Enterprises, Inc., 29901 Agoura Road, Agoura, CA 91301 (annual) $9.95/year (818) 991-4980.

RV News, 28215 W. Agoura Rd., Suite #5, P.O. Box 237, Agoura Hills, CA 91301-0237 (monthly) $20.00/year (818) 991-6043 or (818) 991-6044.

RV Times, #1-7340 Horne Street, Mission, B.C., V2V 3Y6

RV Trade Digest, Continental Publishing Co., of Indiana, Inc., P.O. Box 1805, Elkhart, IN 46515 (monthly) $24.00/year (219) 295-1962.

The Developmental Trades, Resort Publishers, Inc., Rt. 12, Box 497, Crossville, TN 38555 (monthly) (615) 484-8819.

Van Digest, Continental Publishing Co., of Indiana, Inc., P.O. Box 25583, Chicago, IL 60625 (monthly) $40.00/year (312) 539-1936.

Western RV News, 362 Pittock Block, Portland, OR 97205 (monthly) $12.00/year (503) 222-1255.

Woodall's Campground Management, 100 Corporate North, Suite 100, Bannockburn, IL 60015-1253 (monthly) $10.00/year (312) 295-7799.

Woodall/Goldman's Guide for Buyers & Sellers of Campgrounds, 100 Corporate North, Suite 100, Bannockburn, IL 60015-1253 $10.00/ four times yearly with eight updates (312) 295-8858.

APPENDIX H
CAMPING CLUBS

NATIONAL CAMPING CLUBS:

Canadian Family Camping Federation
P.O. Box 397
Rexdale, Ontario, Canada M9W 1R3

Escapee Club
c/o Kay Peterson
Route 5, Box 310
Livingston, TX 7351
(409) 327-8873

Family Motor Coach Assn. *
(Motorhome owners only)
c/o Ginny Bauman
P.O. Box 4414
Cincinnati, OH 45244
(513) 474-3622
(800) 543-3622
"Family Motor Coaching" **

Good Sam RV Owners Club *
c/o Susan Bray
29901 Agoura Road
Agoura, CA 91301
(818) 991-4980
"Hi-Way Herald" **

International Travel & Trailer Club
15320 Creshaw Blvd.
Gardena, CA 90249
(213) 329-9903

Loners on Wheels
808 Lester St.
Poplar Bluff, MO 63901
(817) 626-4538

The Motorhome Travelers Association, Inc.
(Motorhome owners only)
P.O. Box 7505
Pensacola, FL 32514
(904) 474-1830
"RV Gram" **

National Campers and Hikers Association
c/o Fran Opela
4804 Transit Road
Depew, NY 14043
(716) 668-6242
"Camping Today" **

North American Family Campers Association,Inc
c/o Harold F. Coakley
3 Long Hill Road
Concord, VT 05824
(802) 695-2563
"Campfire Chatter" **

The International Family Recreation Association
P.O. Box 6279
Pensacola, FL 32503-0279
(904) 477-2123
"The Recreation Advisor" **

The National RV Owners Club
P.O. Drawer 17148
Pensacola, FL 32522
(904) 477-2123
"The Recreation Advisor" **

* RVIA Members
** Official Newsletter/Publication

BRAND NAME CAMPING CLUBS:
(Limited to owners of particular brands of recreation vehicles.)

Alpenlite Travel Club
c/o Bill Doyle
P.O. Box 9152
Yakima, WA 98908-0152
(509) 452-3524
"The Traveling Echo" **

Cortez National Motor-home Club
c/o Tony & Jan Noto
11022 E. Daines Drive
Temple City, CA 91780
(818) 444-6030

American Clipper Owners Club
c/o R.M. Cornwell, D.D.S.
514 Washington St.
Marina Del Rey, CA 90292
(213) 823-8945/(213) 823-6433

Avion Travelcade Club *
1300 E. Empire Avenue
Benton Harbor, MI 49022

Barth Ranger Club *
State Road 15
Milford, IN 46542
(219) 658-9401

Beaver Ambassador Club *
c/o Angela Piazza
20545 Murray Road
Bend, OR 97701
(503) 389-1144

Streamline Royal Rovers
c/o Peggy Vandiver
808 Clebud Drive
Euless, TX 76040
(817) 267-2167

Carriage Travel Club, Inc. *
c/o Sid Cottrell
P.O. Box 246
Millersburg, IN 46543
(219) 642-3622
"The Campin Nooz" **

Champion Fleet Owners Association *
5573 E. North Street
Dryden, MI 48428
(313) 796-2211
"The Crow's Nest" **
* RVIA Members
** Official Newsletter/Publication

Globestar Trailer Club *
Thomas Orcutt
6031 S.R. 35 East
Jamestown, OH 45335
(513) 675-2944

Holiday Rambler RV Club *
c/o Edmond Bowling
400 Indiana Avenue
P.O. Box 587
Wakarusa, IN 46573
(219) 862-7330
"Holiday Ramblings" **

Honey Bees
P.O. Box 903
Mishawaka, IN 46544
(219) 258-0591

ElDorado Caravan *
c/o Greg Stewart
P.O. Box 266
Minneapolis, KS 67467
(913) 392-2171

Elkhart Traveler National Club *
c/o Carl & Agnes Anderson
2211 W. Wilden Avenue
Goshen, IN 46526
(219) 533-9527

Fan Trailer Club *
c/o Watson P. Pringle
Route 7, Box 348
New Castle, PA 16102
(412) 667-8264

Fireball Caravaner *
c/o Joseph Kurmann
12087 Lopez Canyon Road
San Fernando, CA 91342
(213) 896-5253

First Xplorer
c/o Joe Murray
3950 Burnsline Road
Brown City, MI 48416
(313) 346-2771

Foretravel Motorcade Club *
c/o Carla Vinson
1221 N. W. Stallings Drive
Nacogdoches, TX 75961
"Motorcader" **

Rockwood Travel Club
c/o Larry Branaham
P.O. Box 991
Mishawaka, IN 46544
(219) 258-0591
"The Roadway" **

Serro Scotty Club *
c/o Joseph Pirshl
Arona Road
Irwin, PA 15642
(412) 863-3407

Silver Streak Trailer Club *
c/o Paul Beckman
226 Grand Avenue, #207
Long Beach, CA 90803
(213) 433-0539

International Coachmen Caravan Club *
c/o George Jordan
P.O. Box 30, Hwy. 13 N.
Middlebury, IN 46540
(219) 825-8245
"Coachmen Capers" **

International CC Country Club
c/o Don Dolan
P.O. Box 207
Junction City, OR 97448
(503) 998-3712

International Skamper Camper Club *
c/o Mel Olinghouse
P.O. Box 338
Bristol, IN 46507
(219) 848-7411

Jayco Jafari
c/o Phil Garmire
P.O. Box 1012
Mishawaka, IN 46544
(219) 258-0591

Lazy Daze Caravan Club *
c/o Don Nelson
4303 E. Mission Blvd.
Pomona, CA 91766
(714) 627-1219
* RVIA Members
** Official Newsletter/Publication

Wally Byam Caravan Club International *
(Airstream)
c/o Dave Reed
803 E. Pike Street
Jackson Center, OH 45334
(513) 596-5211

Wings of Shasta Travel Club *
P.O. Box 912
Middlebury, IN 46540
(219) 534-2651
"The Shafari Drummer" **

Winnebago Itasca-Travelers *
c/o John Morris
P.O. Box 268
Forest City, IA 50436
(515) 582-6874

Yellowstone National Travelers *
c/o Harold Hinchman
P.O. Box 951
Mishawaka, IN 46544
(219) 258-0591

* RVIA Members
** Official Newsletter/Publication

Sportscoach Owners International
c/o Scott Brady
3550 Foothill Blvd.
Glendale, CA 91214
(818) 249-4175
"The Sportscoach Owner" **

Starcraft Camper Club *
c/o Larry Branham
P.O. Box 913
Mishawaka, IN 46544
(219) 258-0612

Travelcraft Ambassadors Club *
c/o Jon Whitaker
P.O. Box 1244
Mishawaka, IN 46544
(219) 258-0591

Travelmaster Travel Club *
c/o Jay Horne
P.O. Box 991
Mishawaka, IN 46544
(219) 258-0591

APPENDIX I

PUBLICATIONS FOR RV OWNERS

Magazines and Newspapers:

Camping and RV Magazine, Joe Jones Agency, 440 E. State Street, Iola, WI 54945 (monthly) $8/year.

Camperways, P.O. Box 460, Spring House, PA 19477 (10 times per year) $9.00/year (215) 643-2058.

Camping Canada Magazine, CRV Publications Canada, Ltd., 2077 Dundas St., E., Mississauga, Ontario, Canada, L4X 1M2 (7 times/ year, Feb. - Nov.) $22.00/year for U.S.A. subscribers (416) 624-8218.

Camp-orama, 7077 S. Tamiami Trail, Suite C, Sarasota, FL 33581 (monthly) $12.00/year (813) 366-5427.

Chevy Outdoors, Ceco Communications Inc., 30400 Van Dyke, Warren, MI 48093 (quarterly) $15.97/12 issues, 800-232-6266.

Disabled Outdoors, 5223 South Lorel Avenue, Chicago, IL 60638 (4 issues) $8.00/year (312) 284-2206.

Family Motor Coaching, P.O. Box 44144, Cincinnati, OH 45244 (monthly) $20.00/year (513) 474-3622; 1-800-543-3622.

4WD and Off Road, Petersen Publishing Co., 8490 Sunset Blvd., Los Angeles, CA 90069 (monthly) $17.94/year (213) 854-2222.

Hi-Way Herald, TL Enterprises, Inc., 29901 Agoura Road, Agoura, CA 91301 (monthly) $15/year (818) 991-4980.

Marine & Recreation News, 27601 Little Mack Street, St. Clair Shores, MI 48081 (weekly) $7.50/year (313) 777-8866.

Motorhome, TL Enterprises Inc., 29901 Agoura Road, Agoura, CA 91301 (monthly) $18.00/year (818) 991-4980.

Northeast Outdoors, 70 Edwin Ave., Box 2180, Waterbury, CT 06722 (monthly) $7.00/year (203) 755-0158.

RV Life, Fisherman's Terminal, Building C-3, Room #110, Seattle, WA 98119 (monthly) $12.00/year (206) 282-7545.

RV'n On, 10417 Chandler Blvd., N. Hollywood, CA 91601 (monthly) $8.50/year (818) 763-4515.

RV Times, #1-7340 Horne Street, Mission, B.C., V2V 3Y6.

Southern RV, Westminster Florida, Inc., P.O. Box 811, Bradenton, FL 33506 (monthly) $12.00/year (813) 748-6408.

The Camper Times, Royal Productions, P.O. Box 6294, Richmond, VA 23230 (bi-monthly) $3.00/year (804) 270-5653.

Trailer Life, TL Enterprises, Inc., 29901 Agoura Road, Agoura, CA 91301 (monthly) $16.00/year (818) 991-4980.

Trails-A-Way, 9425 S. Greenville Rd. Greenville, MI 48838 (11 times/year) $8.00/year (616) 754-9179.

Western RV Traveler, 2019 Clement Avenue, Alameda, CA 94501 (monthly) $12.00/year (415) 865-7500.

Campground Directories:

Anderson's Campground Directory, 8916 Brook Road, McLean, VA 22102 264 pages $3.95.

Canadian Campground Directory & Buyers Guide, CRV Publishing Co., 2077 Dundas St., E., Suite 202, Mississauga, Ontario, Canada L4X 1M2 $4.50.

KOA Directory/Road Atlas/Camping Guide, Kampgrounds of America, Inc., P.O. Box 30558, Billings, MT 59114, $2 by mail or free at any KOA campground in the U.S. or Canada.

Rand McNally RV Park & Campground Directory, Simon & Schuster, 200 Old Tappan Road, Old Tappan, NJ 07675

Approx. 768 pages $13.95 plus $2.25 postage.

Safari Campground Directory, United Safari International, Inc., 30 N. 18th Ave., Sturgeon Bay, WI 54235 FREE.

Trailer Life RV Campground & Services Directory, TL Enterprises, 29901 Agoura Road, Agoura, CA 91301. Approx. 1,500 pages discount, $10.95 plus $2.25 postage.

Wheelers Recreational Vehicle Resort & Campground Guide, Print Media Services, 1521 Jarvis Ave., Elk Grove Village, IL 60007 (Toll free number listed for campground information as an added service) 792 pages $10.95 plus $2.25 postage.

Woodall's Campground Directories, Woodall Publishing Co., 100 Corporate North, Suite 100, Bannockburn, IL 60015-1253 American Edition, $13.95 Eastern & Western Editions, $8.95 each; State Directory, $3.95 each plus postage.

APPENDIX J

FOCUS GROUP HIGHLIGHTS

A focus group session was held at the beginning of this project. It was designed to gain a greater understanding of the attitudes and perceptions of RVers. It was further intended to provide input to the development of the RV users survey.

Its objectives were as follows:

OBJECTIVES

a) examine the general attitude and perception of camping

b) determine recreation vehicle use and preferences

c) determine general habits and characteristics of campers

d) investigate RV users preferences in campgrounds

e) investigate information requirements of RV users

f) provide information to design the RV users questionnaire.

METHODOLOGY

The focus group was undertaken in Vancouver. Twelve participants were recruited according to the following qualifications:

a) ownership of a Recreational Vehicle

- tent trailer
- truck and camper
- motor home up to 25'
- motor home over 25'
- travel trailer

b) participants must have vacationed in B.C. and used a campground in the last two years

c) recruiting included representation of the following age groups:

# recruited	age group
2	18 - 24
3	25 - 34
3	35 - 44
2	45 - 54
2	55+

SUMMARY OF FINDINGS

Impressions of Camping

- Camping means out-of-doors, scenery and fresh air. To most of the respondents camping was getting away from the city and being involved in outdoor activities. To some camping conjured up thoughts of tenting.
- Camping also meant being together as a family. It was considered a social activity by some and generally was perceived as inexpensive.
- All participants viewed camping as a relaxing activity providing the opportunity to get away. Some appreciated the change in routine and lack of pressure. They could get closer to nature.
- Camping was viewed as a social activity by many. It provided a chance to be with family and friends and to meet new people. Many participants felt people were friendlier away from the city and that campers were good people.
- A few stated camping was the means to do a favourite activity such as hiking, hunting, fishing and boating.
- Respondents disliked the rain, insects and crowding when camping.

Recreational Vehicle Use

- Reasons for using RVs were varied. Some participants viewed RVs as convenient, with very little trip preparation required. No cooking outside in rain or leaking tents.
- Tent trailers were a cheaper compromise to a larger vehicle. Truck campers were considered multi-use, as the trucks could be used for activities other than camping.
- About half of the participants graduated from tents to RVs.
- Several people rented out their RVs to help pay for them.
- Some started with tent trailers or smaller vehicles then graduated to larger motor homes or trailers.

General Characteristics of Campers

- Destinations appear to be Washington State, Oregon and Southern B.C. with California and other Western U.S. States as secondary destinations.
- There seems to be a great deal of weekend camping from early spring to fall. These trips are shorter in distance; generally into the Lower Mainland.
- Appeared to be three types of demands for destinations:

    a) roughing it, more remote type of camper away from crowds
    b) organized camping with basic facilities, water, showers, water, wood
    c) resort oriented camping with all the facilities; electrical hookups, stores, swiming pools, and activities like available.

- Family oriented destinations were preferred by many.
- Travel parties were usually couples, friends or families.
- Equipment used by RVers was limited to boats, motorcycles, bicycles and fishing rods.
- Activities included swimming, fishing, walking/hiking and boating.
- Trip decision-making was generally a group decision. In some cases the trips were planned around a specific activity such as fishing or boating or a personal interest.

- Trips were planned in advance.
- Distance and time were determining factors in destination selection.
- Trip characteristics were influenced by family situations. Consideration regarding safety, activities, etc. were taken into account.
- Retired persons were very active campers and tended to travel more often and further from home.
- There was a lack of awareness of Northern B.C. as an RV destination.
- The general image of the North is one of remoteness, inadequate facilities, short season, poor road conditions.
- One point against travelling North from Vancouver was the 100 mile trip to Hope before starting north.

RV Campgrounds

- When asked about campgrounds in B.C. the general opinion was positive. U.S. campgrounds were seen as very good having a variety of facilities and activities available. B.C. campgrounds were perceived as not having as much variety and facilities.
- Government campgrounds were popular. They were considered different to the private campgrounds. Government campgrounds were more spacious, and less developed and less organized than private ones. The layout of sites were generally better and considered closer to nature.
- Participants did not like the crowding at many private establishments but felt security was far better. Security was important to most participants.
- Facilities considered important were toilets, showers, sani-stations, water and fire pits.
- Private campgrounds were considered more expensive but provided more amenities such as power and hot water.
- A few people were members of camping chains and felt there were benefits such as reservations and discounts.
- Reservation capabilities was a feature a few people would like to see.

Information Requirements

- Participants sought information from info centres, Chambers of Commerce, the Accommodation Guide, B.C.A.A. and newspapers.
- Word of mouth was also important.
- Group respondents liked the idea of a publication geared strictly to camping.

CONCLUSIONS

- There appeared to be three types of RV users.

1. The rough-it type.
2. The person who wanted basic organization and facilities.
3. The resort type who wanted a more encompassing campground.

- Camping was considered a social activity particularly for family and friends. People wanted to get away from the city into a more natural setting.

- Camping generally revolved around an activity such as fishing and boating.

- Destinations were generally Southern B.C. and Northwestern U.S. Generally there was a lack of awareness of Northern B.C. and a reluctance to take a chance in more remote areas. RV users don't necessarily want to rough it.

- Camping activities are influenced by children and retirement.

- Most campers seem to have a history of camping as a child or as part of a family.

- For most RVers basic facilities such as toilets, showers, water were all that was required. A few wanted more such as electrical hookups, hot water, etc.

- Time was a major consideration for length of trip and destination.

- There seemed to be a great deal of weekend short-term trips.

- Camping was considered a less expensive form of vacation.